ITCSO Training Academy

Delivery Schedule Manager (DSM) 2.0

External Users

October 2009

DCMA eTOOLS

eTOOLS is DCMA's Web-based suite of DCMA-unique mission applications for use by DCMA, our customers, and industry trading partners.

It includes the DCMA Enterprise Portal, web-based applications, and the Integrated Database (IDB).

Supporting the mission of the Agency, eTOOLS effectively enables standardization, simplification and cycle time improvement for many of our business processes with availability 24/7.

Course Topics

Course Modules and Topics

Note: Links will ***only*** work in PowerPoint's slide show view.

Module One	**DSM 2.0 Overview**
Topic One	DSM 2.0 Introduction
Topic Two	Accessing DSM 2.0
Topic Three	Home Page
Topic Four	My Workload
Topic Five	DoD Preferences
Topic Six	Search Features
Topic Seven	Reports

Module Two	**Creating Customer Requests**
Topic One	Create a Customer Request
Topic Two	Contract Found CLIN Selection
Topic Three	Multiple Contracts Found
Topic Four	Contract Not Found
Topic Five	Data Entry
Topic Six	Retrieving Customer Requests

Module Three	**Additional Pages**
Topic One	Contract Details
Topic Two	Supplier Details
Topic Three	History Link
Topic Four	Print View Link
Topic Five	E-Mail Notifications

Course Topics

Course Objectives

At the end of the guide you should be able to:

- Understand the purpose of Delivery Schedule Manager (DSM) 2.0
- Define preferences within DSM 2.0
- Manage your Workload page
- Search communications
- Create customer requests
- Enter a contract into DSM when one can’t be found
- Read and respond to communications

Course Topics

Course Modules

Course Modules

Module One	DSM 2.0 Overview
Module Two	Creating Customer Requests
Module Three	Additional Page Details

Course Topics

Module One

Delivery Schedule Manager (DSM) Overview

Module One – Topics

Module One - DSM 2.0 Overview

Topic One	DSM 2.0 Introduction
Topic Two	Accessing DSM 2.0
Topic Three	Home Page for External Customers
Topic Four	My Workload
Topic Five	DoD Customer Preferences
Topic Six	Search Features
Topic Seven	Reports

Course Topics

Module One – Objectives

At the end of Module One you should be able to:

- Identify the enhancements made to DSM 2.0
- Access the DSM 2.0 application
- Navigate the External User DSM interface
- Perform Contract Searches

Course Topics

Topic One - DSM 2.0 Introduction

What is DSM?

The Delivery Schedule Manager (DSM) Application proactively provides valuable production information so you can make informed contract decisions.

DSM:

- Is a web-based application that helps to ensure the successful delivery of shipments to the specified schedule, quantity and cost.
- Enables customers to manage delivery schedules more efficiently and effectively by allowing customers to create production requests, receive delay notices and view valuable reports.
- Allows every stakeholder assigned to a contract to collaborate so everyone is informed about delays affecting service or mission critical deliveries.

Topic One - DSM 2.0 Introduction

Delivery Schedule Manager (DSM) 2.0 Overview

The Delivery Schedule Manager (DSM) 2.0 provides a means of communication between DCMA Contract Management Team (CMT) personnel and participating customers at buying activities on matters pertaining to delay notices and customer requests.

DSM 2.0 allows users to enter and select pertinent data to initiate delay notices and customer requests. Based on this initial information, DSM 2.0 automatically notifies personnel, by E-Mail, that a delay notice or customer request has been generated. System users affected by the delay notice or customer request must use DSM 2.0 to respond.

Topic One - DSM 2.0 Introduction

Delivery Schedule Manager (DSM) 2.0 Overview

The system maintains a record of all DSM-generated communications between the DCMA's personnel and customers for a delay notice or customer request.

In addition, DSM 2.0 provides visibility of delay notices and customer requests to Contract Management Supervisors, Team Leads, Contract Management Office (CMO), Division, and HQ levels.

DSM 2.0 is intended to be used by Customers (DoD and Non-DoD), as well as DCMA personnel (HQ, Division, CMO, CMT Supervisor and CMT members).

Because the business perspectives of DCMA personnel and the customers differ slightly, the screens and processing options available to each group also vary slightly.

Topic One - DSM 2.0 Introduction

Enhancement Changes/Additions v2.0

- ✓ Link in gold bar on workload page for “CMT Viewer”
- ✓ “Print View” link to display data in PDF format
- ✓ Wildcard searches when creating Delay Notices and Customer Requests
- ✓ Display of agency, phone number and e-mail address of person sending Customer Request
- ✓ Ability to resend Delay Notices and Customer Requests before response is received
- ✓ Ability to edit, resend or cancel a record prior to response

Topic One - DSM 2.0 Introduction

Enhancement Changes/Additions v2.0

- ✓ “Follow-Up” and “End Date” fields for both customers and DCMA
- ✓ Suspense Date in Response block of Customer Request indicating the next follow-up due date
- ✓ Search History Link for communications
- ✓ NSN column on Customer Requests workload
- ✓ NSN added to subject line of E-Mail messages

Course Topics

Topic One - DSM 2.0 Introduction

Enhancement Changes/Additions v2.0

- ✓ Broadcast Message on the home page
- ✓ Prohibit delay notice input on Basic Ordering Agreement Contracts (DN issued on orders only)
- ✓ Customer Requests will remain on active workload until response is initiated
- ✓ Suspense date displayed on Customer Request tab will turn red when the suspense date is missed and no response has been issued
- ✓ Duplicate Customer Request are not allowed

Topic One - DSM 2.0 Introduction

Enhancement Changes/Additions v2.0

- ✓ Customer Requests can be input without any CLINs or when all CLINs are shipped
- ✓ Supervisors and Team Leads can view groups of CMOs
- ✓ Added a field for ‘Contractor’s Promised Delivery Date’ for types of Customer Requests of Accelerate/Expedite, Crisis, Readiness or Backorder
- ✓ Added field “Initiator” for draft records released by another user
- ✓ Sort capability in Workload Tabs

Topic One - DSM 2.0 Introduction

Enhancement Changes/Additions v2.0

- ✓ Customer Requests can be input on contracts in all Sections, not only Section One
- ✓ Ability to sort Status column on My Workload page
- ✓ Icons in Status column are more legible
- ✓ E-Mail subject line to customer will display “DSM Messenger”

Course Topics

Topic One - DSM 2.0 Introduction

NEW ENHANCEMENTS FOR VERSION 2.0

From v1.5:	To v2.0:
• Search Contracts link on the gold bar	Contract Viewer link gold bar
• History link on the gold menu bar	History link for contract. Display only if there is history
• "Role Code" column in Delay Notice Workload view	Replaced with new "Date Sent" column
• "Received" column in Customer Request Workload view	Replaced with new "Latest Communication" column (date sent)
• Accelerate and Expedite Type Requests for Customer Requests as separate types	Combined Accelerate/Expedite into one type of request
• Display thirty days of communications in Delivery Forecast Workload Tab	Displays fifteen days of communications in Delivery Forecast Workload Tab

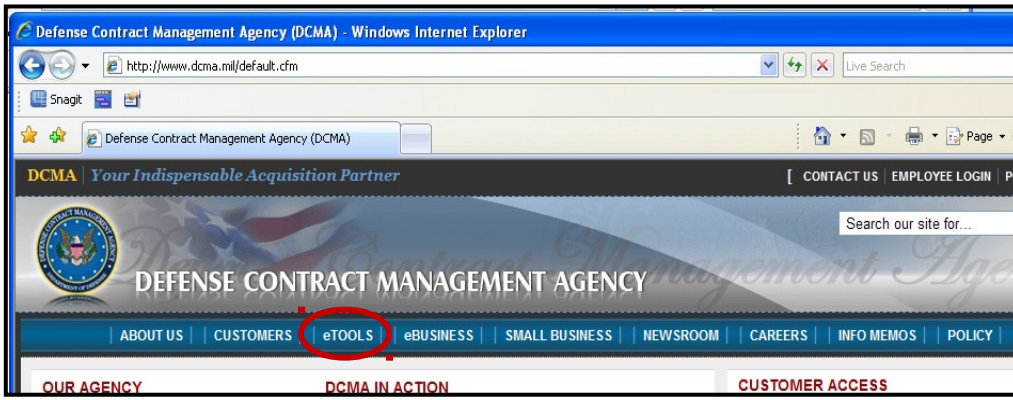
Course Topics

Topic Two – Accessing DSM 2.0

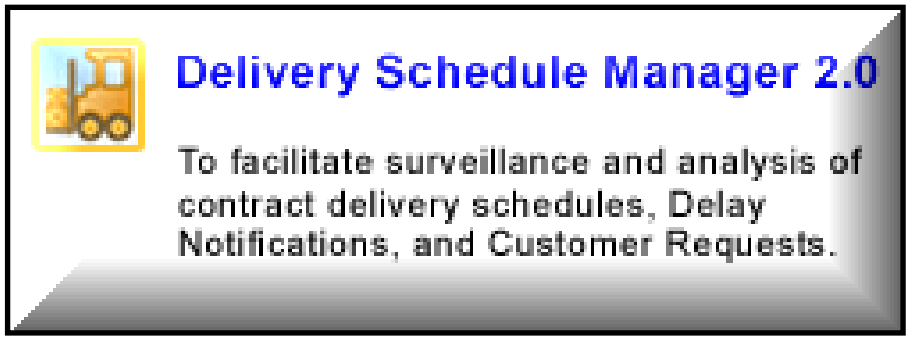
Accessing DSM 2.0

You must be logged into eTools to access Delivery Schedule Manager (DSM) 2.0.

Accessing DSM 2.0 (Graphic 1.2.1 - 1.2.2)	
1.	*Access* **www.dcma.mil**
2.	*Select* **eTools** from the menu bar**.** (Graphic 1.2.1) • You will be directed to the access to eTools page
4.	*Select* your **login** in the DCMA or Registered User section**.**
5.	*Accept* the **User Agreement.**
6.	*Type* your **user name** and **password.**
7.	*Click* **Login** • The eTools page displays
8.	*Select* on the **Delivery Schedule Manager 2.0** button. (Graphic 1.2.2)



Graphic 1.2.1: eTools Link


Delivery Schedule Manager 2.0
To facilitate surveillance and analysis of contract delivery schedules, Delay Notifications, and Customer Requests.

Graphic 1.2.2: Delivery Schedule Manager 2.0 Icon from eTools

Topic Three – Home Page for External Customers

Home Page - External Customers

The Home Page for all External Users displays an Inbox. The Inbox contains links to View and Add Customer Requests and a link to View Delay Notices.

Load Workload - Loads the Customer Requests workload; can also be accessed by clicking Workload from the menu bar

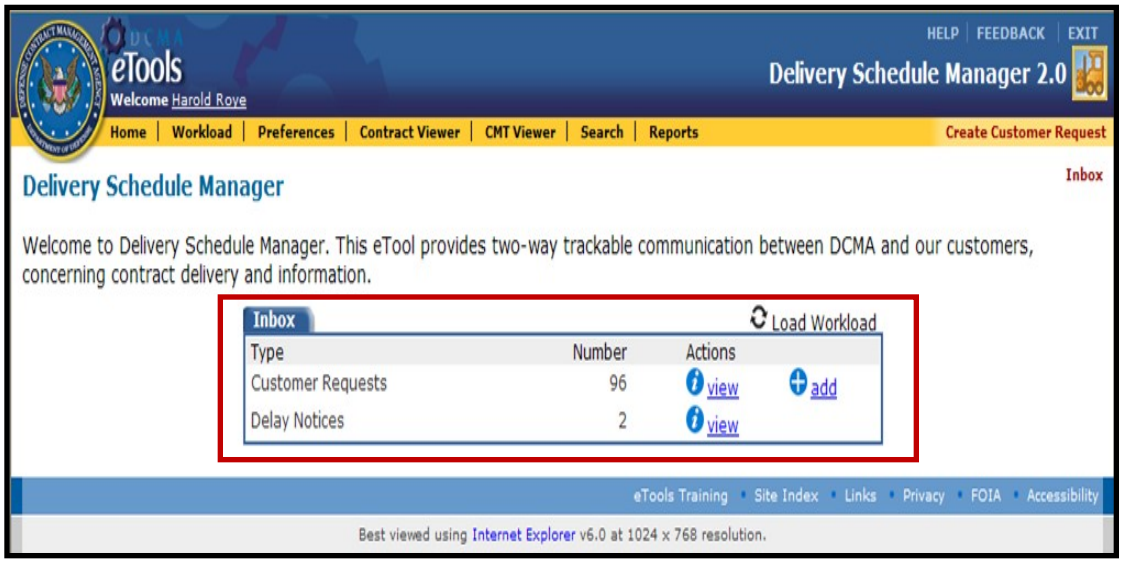
Customer Requests

View - To view Customer Requests that affect the user

Add - To create Customer Requests; can also be accessed by clicking “Create Customer Request” from menu bar options

Delay Notices

View - To view Delay Notices that affect the user


eTools
Welcome Harold Roye
HELP | FEEDBACK | EXIT
Delivery Schedule Manager 2.0
Home | Workload | Preferences | Contract Viewer | CMT Viewer | Search | Reports
Create Customer Request
Inbox
Delivery Schedule Manager
Welcome to Delivery Schedule Manager. This eTool provides two-way trackable communication between DCMA and our customers, concerning contract delivery and information.
Inbox
Load Workload
Type
Number
Actions
Customer Requests
96
view
add
Delay Notices
2
view
eTools Training • Site Index • Links • Privacy • FOIA • Accessibility
Best viewed using Internet Explorer v6.0 at 1024 x 768 resolution.

Graphic 1.3.1: External Customers (DoD Users) Home Page

Topic Three – Home Page for External Customers

Menu Bar Options

The following is a description of the menu bar options:

Menu Bar (see Graphic 1.3.2)	
Workload	Displays customer requests and delay notices that affect you
Preferences (DoD Only)	For listed DoDAACs, enter CAGE Codes to limit listings to your Workload
Contract Viewer	Search for a Contract or Contract MODs
CMT Viewer	View the CMT for a CAGE or Contract that is in one of DCMA's contract sources is MOCAS
Search	Search for contracts by NSN, search for contracts with a history of DSM Communications within the last 13 months
Reports	View Reports ,Cubes and Ad Hoc for DSM
Create Customer Requests	Create Customer Requests

HELP | FEEDBACK | EXIT
eTools
Welcome Harold Roye
Delivery Schedule Manager 2.0
Home | Workload | Preferences | Contract Viewer | CMT Viewer | Search | Reports
Create Customer Request

Graphic 1.3.2: External Customers Menu Bar

Preferences Menu Option is only available to DoD Users

Course Topics

Topic Four – My Workload

My Workload Page - Sorting

When you select the Workload menu option you can review your workload which has two tabs, one to display Delay Notices and one to display Customer Requests that are associated with you.

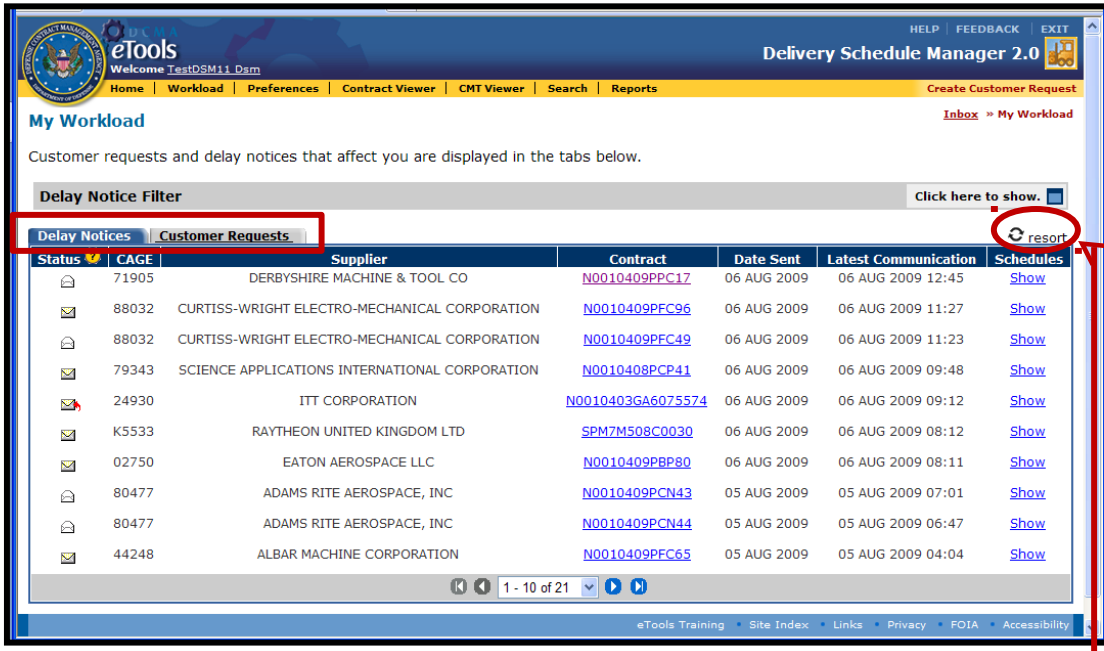
The default sort order for the data displayed is:

- Latest Communication date (primarily)
- Suspense date (secondarily).

Clicking on any column header will sort the column in ascending or descending order

Clicking the resort icon will restore the data to the default sort order.

My Workload (Graphic 1.4.1)	
1	*Select* **Workload** from the menu**.**
2	*Click* the **Contract** column header. • The Contract column is now sorted in ascending order
3	*Click* the **resort** link. • The default sort order is restored


eTools
Welcome TestDSM11_Dsm
HELP | FEEDBACK | EXIT
Delivery Schedule Manager 2.0
Home | Workload | Preferences | Contract Viewer | CMT Viewer | Search | Reports
Create Customer Request
My Workload
Inbox » My Workload
Customer requests and delay notices that affect you are displayed in the tabs below.
Delay Notice Filter
Click here to show.
Delay Notices | Customer Requests
resort
Status | CAGE | Supplier | Contract | Date Sent | Latest Communication | Schedules
71905 DERBYSHIRE MACHINE & TOOL CO N0010409PPC17 06 AUG 2009 06 AUG 2009 12:45 Show
88032 CURTISS-WRIGHT ELECTRO-MECHANICAL CORPORATION N0010409PFC96 06 AUG 2009 06 AUG 2009 11:27 Show
88032 CURTISS-WRIGHT ELECTRO-MECHANICAL CORPORATION N0010409PFC49 06 AUG 2009 06 AUG 2009 11:23 Show
79343 SCIENCE APPLICATIONS INTERNATIONAL CORPORATION N0010408PCP41 06 AUG 2009 06 AUG 2009 09:48 Show
24930 ITT CORPORATION N0010403GA6075574 06 AUG 2009 06 AUG 2009 09:12 Show
K5533 RAYTHEON UNITED KINGDOM LTD SPM7M508C0030 06 AUG 2009 06 AUG 2009 08:12 Show
02750 EATON AEROSPACE LLC N0010409PBP80 06 AUG 2009 06 AUG 2009 08:11 Show
80477 ADAMS RITE AEROSPACE, INC N0010409PCN43 05 AUG 2009 05 AUG 2009 07:01 Show
80477 ADAMS RITE AEROSPACE, INC N0010409PCN44 05 AUG 2009 05 AUG 2009 06:47 Show
44248 ALBAR MACHINE CORPORATION N0010409PFC65 05 AUG 2009 05 AUG 2009 04:04 Show
1 - 10 of 21
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Graphic 1.4.1: My Workload

Topic Four – My Workload

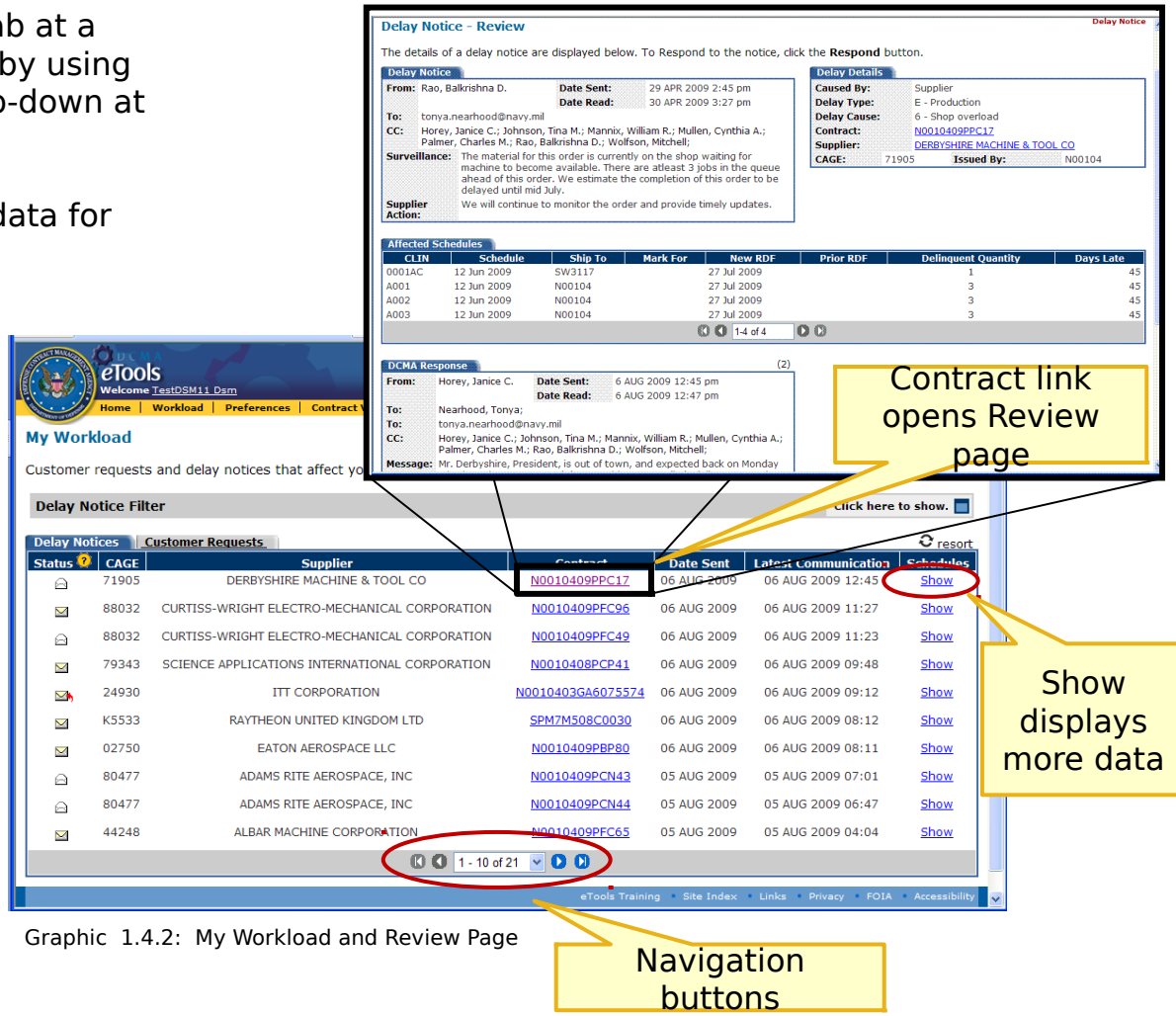
My Workload Page - Navigation

Up to ten items can be displayed on the tab at a time. Additional items may be displayed by using the **page navigation arrows** and or drop-down at the bottom of the tab.

Show links display more column specific data for that contract.

Any **Contract** can be clicked to display a **Review**.

My Workload (Graphic 1.4.2)	
1	*Select* the **Right Navigation** button**.**
2	*Click* any **show** link in the Schedule column. • The schedule displays for that contract
3	*Click* on a **Contract Number**. • A review page for the selected contract displays



Graphic 1.4.2: My Workload and Review Page

Course Topics

Topic Four – My Workload

My Workload Page - Status

For each customer request shown on the tab, the Status column indicates whether the item is awaiting action by the customer or by the DCMA User to which the request was sent.

Mouse over the icon in the status column for a legend defining the status icons.

Status Icon Legend (Graphic 1.4.3)	
1	*From* the **My Workload** page**.**
2	*Mouse-over* the **question mark icon**. • The legend displays indicating where the request or delay is in the correspondence process

Status	CAGE	Supplier	Contract	Date Sent	Latest Communication	Schedules
	71905	DERBYSHIRE MACHINE & TOOL CO	N0010409PPC17	06 AUG 2009	06 AUG 2009 12:45	Show
	88032	CURTISS-WRIGHT ELECTRO-MECHANICAL CORPORATION	N0010409PFC96	06 AUG 2009	06 AUG 2009 11:27	Show
	88032	CURTISS-WRIGHT ELECTRO-MECHANICAL CORPORATION	N0010409PFC49	06 AUG 2009	06 AUG 2009 11:23	Show
	79343	SCIENCE APPLICATIONS INTERNATIONAL CORPORATION	N0010408PCP41	06 AUG 2009	06 AUG 2009 09:48	Show
	24930	ITT CORPORATION	N0010403GA6075574	06 AUG 2009	06 AUG 2009 09:12	Show
	K5533	RAYTHEON UNITED KINGDOM LTD	SPM7M508C0030	06 AUG 2009	06 AUG 2009 08:12	Show
	02750	EATON AEROSPACE LLC	N0010409PBP80	06 AUG 2009	06 AUG 2009 08:11	Show
	80477	ADAMS RITE AEROSPACE, INC	N0010409PCN43	05 AUG 2009	05 AUG 2009 07:01	Show
	80477	ADAMS RITE AEROSPACE, INC	N0010409PCN44	05 AUG 2009	05 AUG 2009 06:47	Show
	44248	ALBAR MACHINE CORPORATION	N0010409PFC65	05 AUG 2009	05 AUG 2009 04:04	Show

1 - 10 of 21

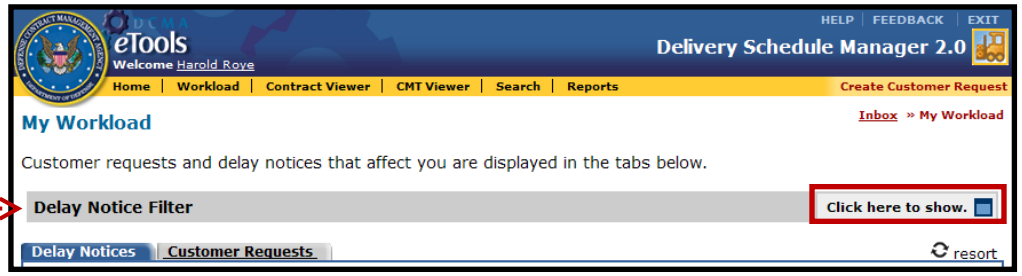
Graphic 1.4.3: Customer Requests Status Indicators

Course Topics

Topic Four – My Workload

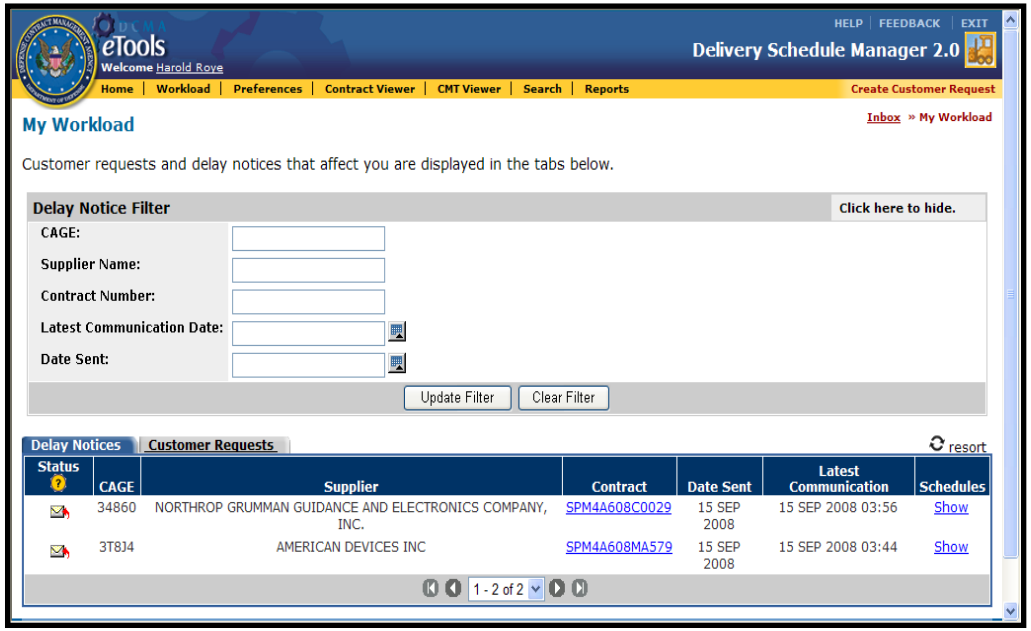
My Workload Page - Filtering

At the top of the Workload you will notice a gray section for filtering. Filtering allows you to narrow down the number of contracts viewed based on specified criteria. Filtering works the same for both Delay Notices and Customer Requests.


eTools
Welcome Harold Roye
HELP | FEEDBACK | EXIT
Delivery Schedule Manager 2.0
Home | Workload | Contract Viewer | CMT Viewer | Search | Reports
Create Customer Request
My Workload
Inbox » My Workload
Customer requests and delay notices that affect you are displayed in the tabs below.
Delay Notice Filter
Click here to show.
Delay Notices
Customer Requests

Graphic 1.4.4: Workload Path - Filtering Options

Filtering the Workload (Graphic 1.4.4 – 1.4.5)	
1	*Select* **Click here to show** in the gray filter bar**.** • The filter expands
2	*Type* in **Criteria** desired.
3	*Click* **Update Filter**. • The contracts fitting the filter criteria displays
4	*Click* **Clear Filter.** • All contracts display



Graphic 1.4.5: Workload Path - Filtering Options

Course Topics

Topic Five – DoD Customer Preferences

Preferences Menu Option (DoD only)

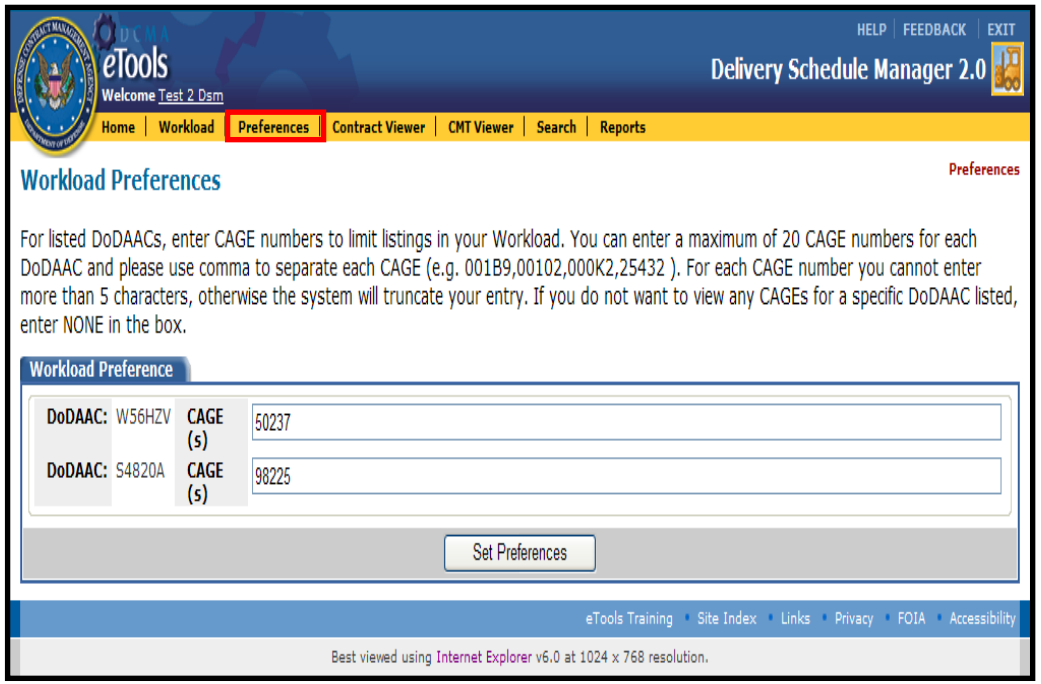
The Preferences menu option is visible to external DoD customers only.

This menu can be accessed to limit listings in the Workload based on CAGE code.

Requirements:

- CAGE codes must be associated with the appropriate DoDAAC.
- You can enter a maximum of 20 CAGE codes for each DoDAAC

Preferences (Graphic 1.5.1)	
1	*Select* the **Preferences** menu option**.**
2	*Type* in desired **CAGE code.**
3	*Click* the **Set Preferences** button**.** • Your Workload will now only display requests and displays associated with the CAGE codes set up in Preferences


HELP | FEEDBACK | EXIT
eTools
Welcome Test 2 Dsm
Delivery Schedule Manager 2.0
Home | Workload | Preferences | Contract Viewer | CMT Viewer | Search | Reports
Workload Preferences
Preferences
For listed DoDAACs, enter CAGE numbers to limit listings in your Workload. You can enter a maximum of 20 CAGE numbers for each DoDAAC and please use comma to separate each CAGE (e.g. 001B9,00102,000K2,25432). For each CAGE number you cannot enter more than 5 characters, otherwise the system will truncate your entry. If you do not want to view any CAGEs for a specific DoDAAC listed, enter NONE in the box.
Workload Preference
DoDAAC: W56HZV CAGE (s) 50237
DoDAAC: S4820A CAGE (s) 98225
Set Preferences
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Best viewed using Internet Explorer v6.0 at 1024 x 768 resolution.

Graphic 1.5.1: Workload Preferences

Course Topics

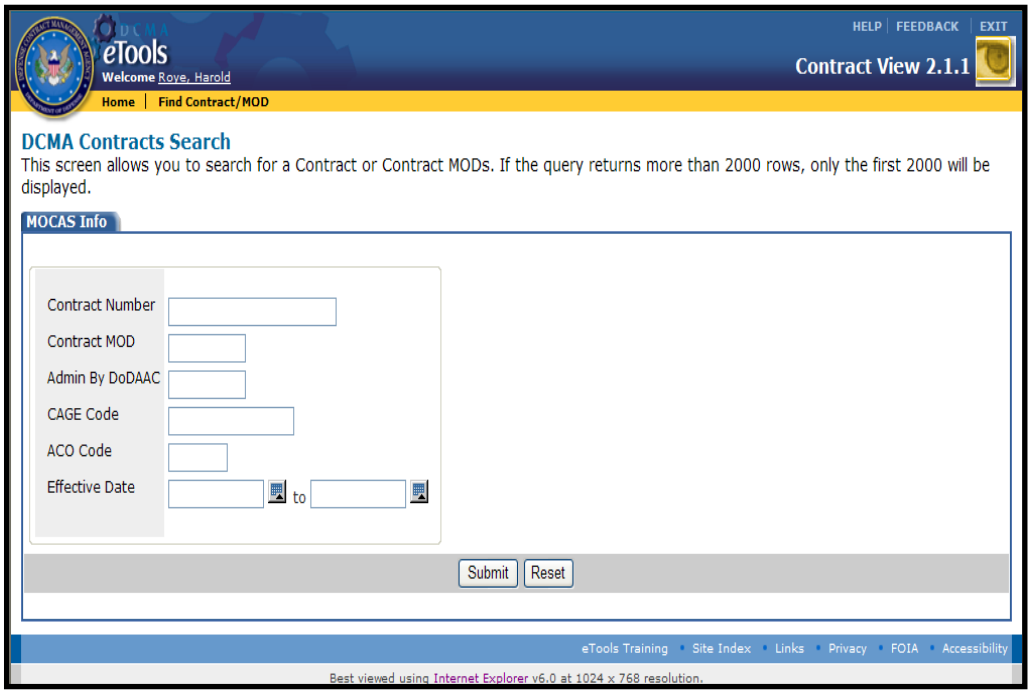
Topic Six – Search Features

Search Features - Contract Viewer

Contract Viewer menu bar option allows you to search for contracts or Contract MODs from MOCAS information.

The more criteria entered the narrower the search results. The Reset button can be used to clear fields.

Contract Search (Graphic 1.6.1)	
1.	*Select* the **Contract Viewer** menu item. • The DCMA Contracts Search page opens in a new window
2.	*Enter* any combination of: • **Contract Number** • **Contract MOD** • **Admin By DoDAAC** • **CAGE Code** • **ACO Code** • **Effective Dates** (Either by clicking the calendar icon or enter dates in the mm/dd/year format)
3.	*Click* the **Submit** button to perform query.
4.	*Close* the **window** to return to DSM


eTools
Welcome Roye, Harold
HELP | FEEDBACK | EXIT
Contract View 2.1.1
Home | Find Contract/MOD
DCMA Contracts Search
This screen allows you to search for a Contract or Contract MODs. If the query returns more than 2000 rows, only the first 2000 will be displayed.
MOCAS Info
Contract Number
Contract MOD
Admin By DoDAAC
CAGE Code
ACO Code
Effective Date
to
Submit
Reset
eTools Training • Site Index • Links • Privacy • FOIA • Accessibility
Best viewed using Internet Explorer v6.0 at 1024 x 768 resolution.

Graphic 1.6.1: Contract Viewer

Course Topics

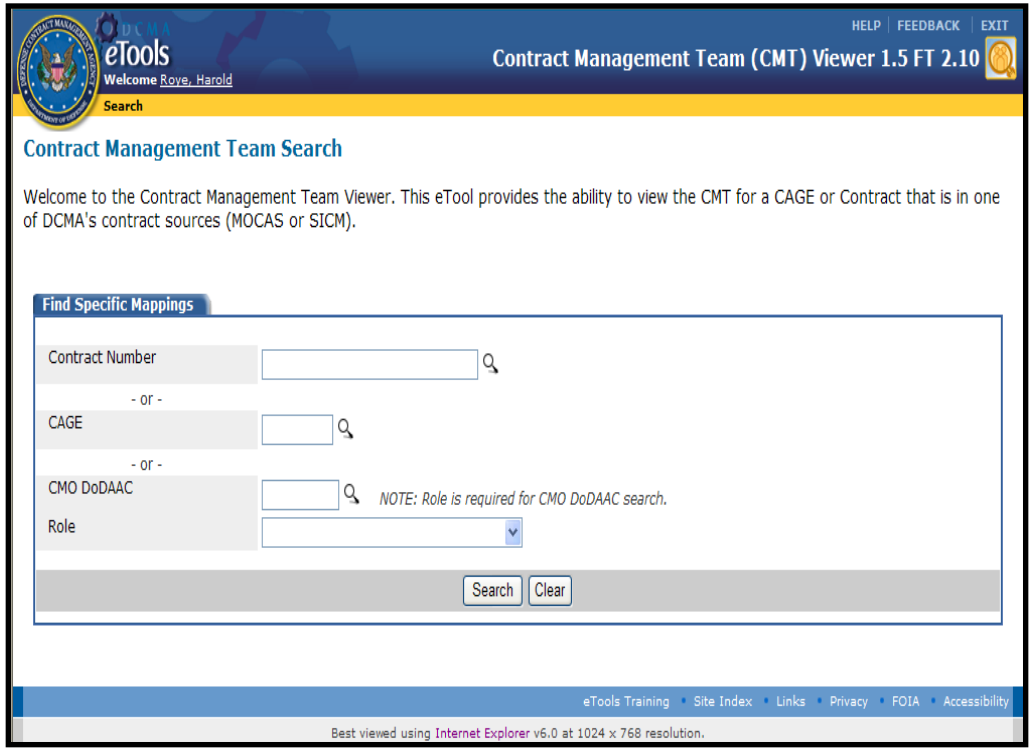
Topic Six – Search Features

Contract Management Team (CMT) Viewer

When you select **CMT Viewer** from the menu bar you can view the CMT for a CAGE or Contract that is either in MOCAS or SICM (DCMA's contract sources).

The Clear button can be used to clear all fields.

CMT Viewer (Graphic 1.6.2)	
1.	*Select* the **CMT Viewer** menu item.
2.	*Enter* any combination of the following: •**Contract Number** •**CAGE Code** •**CMO DoDDAC and Role**
3.	*Click* the **Search** button.
4.	*Close* the **window** to return to DSM.


eTools
Welcome Roye, Harold
HELP | FEEDBACK | EXIT
Contract Management Team (CMT) Viewer 1.5 FT 2.10
Search
Contract Management Team Search
Welcome to the Contract Management Team Viewer. This eTool provides the ability to view the CMT for a CAGE or Contract that is in one of DCMA's contract sources (MOCAS or SICM).
Find Specific Mappings
Contract Number
- or -
CAGE
- or -
CMO DoDAAC
NOTE: Role is required for CMO DoDAAC search.
Role
Search
Clear
eTools Training • Site Index • Links • Privacy • FOIA • Accessibility
Best viewed using Internet Explorer v6.0 at 1024 x 768 resolution.

Graphic 1.6.2: CMT Viewer

Course Topics

Topic Six – Search Features

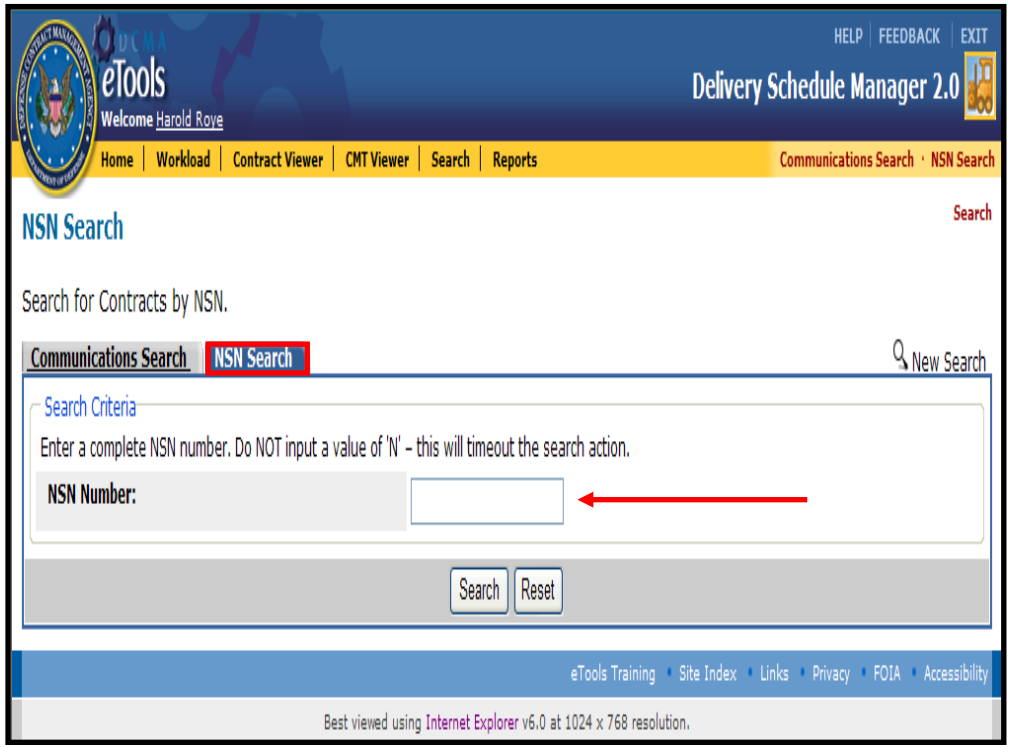
Search – NSN Search

The **Search** feature allows for an NSN search or a Communications search. An NSN search pulls up contracts that contain a specific NSN.

To search for communications within DSM, select the Communications Search tab.

The Reset button can be used to clear all fields.

NSN Search Tab (Graphic 1.6.3)	
1.	*Select* **Search** on the menu bar.
	• The Search page opens displaying a tab that performs an NSN Search and a tab that performs a Communications Search
2.	*Enter* a complete **NSN number.**
3.	*Click* the **Search** button.


HELP | FEEDBACK | EXIT
eTools
Welcome Harold Roye
Delivery Schedule Manager 2.0
Home | Workload | Contract Viewer | CMT Viewer | Search | Reports
Communications Search | NSN Search
NSN Search
Search
Search for Contracts by NSN.
Communications Search
NSN Search
New Search
Search Criteria
Enter a complete NSN number. Do NOT input a value of 'N' - this will timeout the search action.
NSN Number:
Search
Reset
eTools Training | Site Index | Links | Privacy | FOIA | Accessibility
Best viewed using Internet Explorer v6.0 at 1024 x 768 resolution.

Graphic 1.6.3: Search- NSN and Communication Search

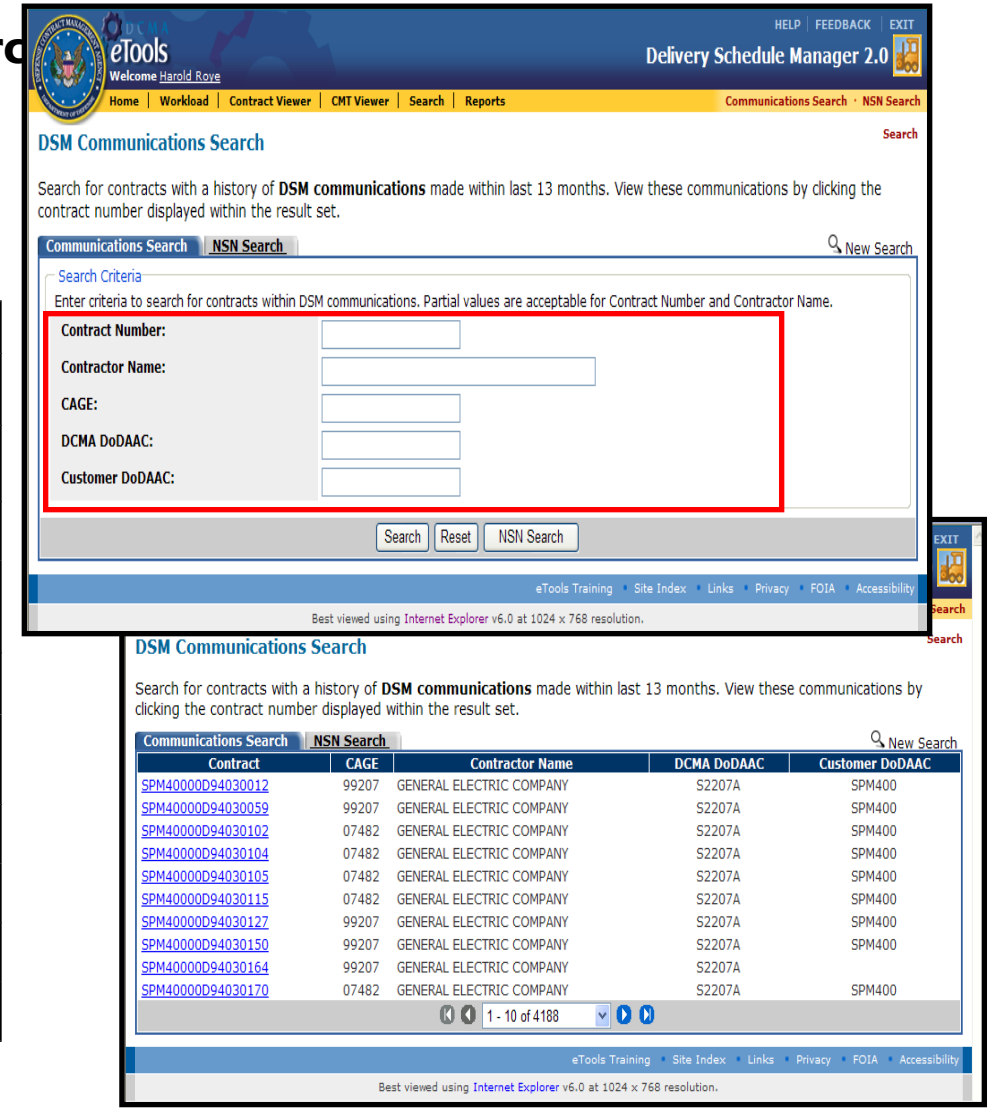
Course Topics

Topic Six – Search Features

Search – DSM Communications Searc

The DSM Communications Search tab searches for contracts with a history of DSM Communications made within the last 13 months. Communications older then 13 months can be accessed in Archives.

DSM Communications Search (Graphic 1.6.4)	
1.	*Select* **Search** from the menu bar.
2.	*Select* the **Communications Search** tab.
3.	*Enter* the **search criteria.** • Partial values are acceptable for Contract Number and Contractor Name
4.	*Click* the **Search** button. • The Communications with the last 13 months display
5.	*Select* the desired **Contract**. • The Contract History page displays
6.	*Select* the **Archive** tab. • Review the Archived communications


eTools
Welcome Harold Roye
Delivery Schedule Manager 2.0
HELP | FEEDBACK | EXIT
Home | Workload | Contract Viewer | CMT Viewer | Search | Reports
Communications Search · NSN Search
DSM Communications Search
Search for contracts with a history of DSM communications made within last 13 months. View these communications by clicking the contract number displayed within the result set.
Communications Search | NSN Search
New Search
Search Criteria
Enter criteria to search for contracts within DSM communications. Partial values are acceptable for Contract Number and Contractor Name.
Contract Number:
Contractor Name:
CAGE:
DCMA DoDAAC:
Customer DoDAAC:
Search | Reset | NSN Search
eTools Training · Site Index · Links · Privacy · FOIA · Accessibility
Best viewed using Internet Explorer v6.0 at 1024 x 768 resolution.
DSM Communications Search
Search for contracts with a history of DSM communications made within last 13 months. View these communications by clicking the contract number displayed within the result set.
Communications Search | NSN Search
New Search
Contract | CAGE | Contractor Name | DCMA DoDAAC | Customer DoDAAC
SPM40000D94030012 | 99207 | GENERAL ELECTRIC COMPANY | S2207A | SPM400
SPM40000D94030059 | 99207 | GENERAL ELECTRIC COMPANY | S2207A | SPM400
SPM40000D94030102 | 07482 | GENERAL ELECTRIC COMPANY | S2207A | SPM400
SPM40000D94030104 | 07482 | GENERAL ELECTRIC COMPANY | S2207A | SPM400
SPM40000D94030105 | 07482 | GENERAL ELECTRIC COMPANY | S2207A | SPM400
SPM40000D94030115 | 07482 | GENERAL ELECTRIC COMPANY | S2207A | SPM400
SPM40000D94030127 | 99207 | GENERAL ELECTRIC COMPANY | S2207A | SPM400
SPM40000D94030150 | 99207 | GENERAL ELECTRIC COMPANY | S2207A | SPM400
SPM40000D94030164 | 99207 | GENERAL ELECTRIC COMPANY | S2207A |
SPM40000D94030170 | 07482 | GENERAL ELECTRIC COMPANY | S2207A | SPM400
1 - 10 of 4188
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Best viewed using Internet Explorer v6.0 at 1024 x 768 resolution.

Graphic 1.6.4: Search- Communication Search tab and Results

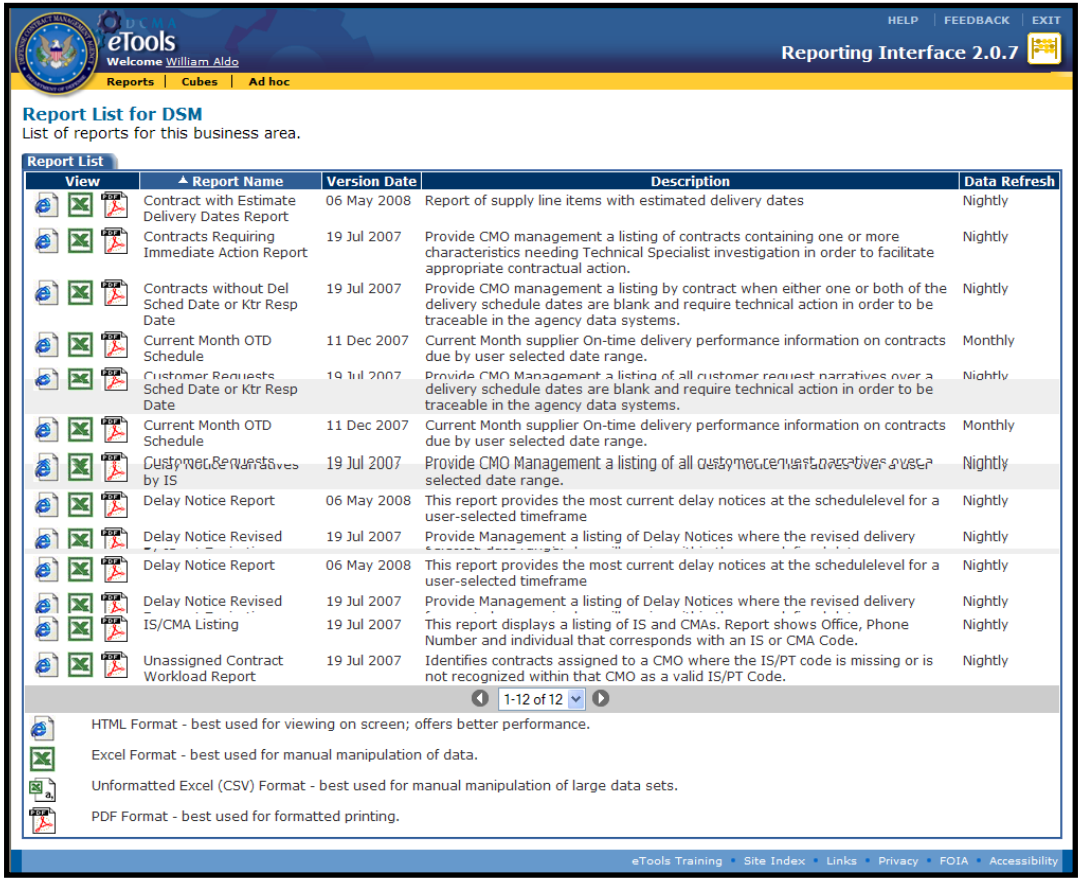
Course Topics

Topic Seven – Reports

Reports - Report List for DSM

When you select Reports from the menu bar, the Report List for DSM displays. From here you can select any of the reports, cubes and ad hoc query.

The DSM reports section is covered in separate training in the eTools training pages.


eTools
Welcome William Aldo
HELP | FEEDBACK | EXIT
Reporting Interface 2.0.7
Reports | Cubes | Ad hoc
Report List for DSM
List of reports for this business area.
Report List
View | Report Name | Version Date | Description | Data Refresh
Contract with Estimate Delivery Dates Report | 06 May 2008 | Report of supply line items with estimated delivery dates | Nightly
Contracts Requiring Immediate Action Report | 19 Jul 2007 | Provide CMO management a listing of contracts containing one or more characteristics needing Technical Specialist investigation in order to facilitate appropriate contractual action. | Nightly
Contracts without Del Sched Date or Ktr Resp Date | 19 Jul 2007 | Provide CMO management a listing by contract when either one or both of the delivery schedule dates are blank and require technical action in order to be traceable in the agency data systems. | Nightly
Current Month OTD Schedule | 11 Dec 2007 | Current Month supplier On-time delivery performance information on contracts due by user selected date range. | Monthly
Customer Requests | 19 Jul 2007 | Provide CMO Management a listing of all customer request narratives over a | Nightly
Sched Date or Ktr Resp Date | | delivery schedule dates are blank and require technical action in order to be traceable in the agency data systems. |
Current Month OTD Schedule | 11 Dec 2007 | Current Month supplier On-time delivery performance information on contracts due by user selected date range. | Monthly
Customer Requests | 19 Jul 2007 | Provide CMO Management a listing of all customer request narratives over a | Nightly
by IS | | selected date range. |
Delay Notice Report | 06 May 2008 | This report provides the most current delay notices at the schedulelevel for a user-selected timeframe | Nightly
Delay Notice Revised | 19 Jul 2007 | Provide Management a listing of Delay Notices where the revised delivery | Nightly
Delay Notice Report | 06 May 2008 | This report provides the most current delay notices at the schedulelevel for a user-selected timeframe | Nightly
Delay Notice Revised | 19 Jul 2007 | Provide Management a listing of Delay Notices where the revised delivery | Nightly
IS/CMA Listing | 19 Jul 2007 | This report displays a listing of IS and CMAs. Report shows Office, Phone Number and individual that corresponds with an IS or CMA Code. | Nightly
Unassigned Contract Workload Report | 19 Jul 2007 | Identifies contracts assigned to a CMO where the IS/PT code is missing or is not recognized within that CMO as a valid IS/PT Code. | Nightly
1-12 of 12
HTML Format - best used for viewing on screen; offers better performance.
Excel Format - best used for manual manipulation of data.
Unformatted Excel (CSV) Format - best used for manual manipulation of large data sets.
PDF Format - best used for formatted printing.
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Graphic 1.7.1: Reports - Reports List for DSM

Course Topics

Module One – Review

Module One Covered the Following Topics:

Topic One	DSM 2.0 Introduction
Topic Two	Accessing DSM 2.0
Topic Three	Home Page for External Customers
Topic Four	My Workload
Topic Five	DoD Customers Preferences
Topic Six	Search Features
Topic Seven	Reports

Course Topics

Module Two

Creating Customer Requests

Module Two Topics

Module Two Topics

Topic One	Create A Customer Request
Topic Two	Contract Found CLIN Selection
Topic Three	Multiple Contracts Found
Topic Four	Contract Not Found
Topic Five	Data Entry
Topic Six	Retrieving A Customer Request

Course Topics

Module Two – Objectives

At the end of Module Two you should be able to:

- Create a Customer Request when a Contract is Found
- Locate the Correct Contract when Multiple Contracts are Found
- Associate the appropriate CLIN to a Contract Found without a CLIN
- Fill in all the Data Entry Fields for a Customer Request

Topic One – Create a Customer Request

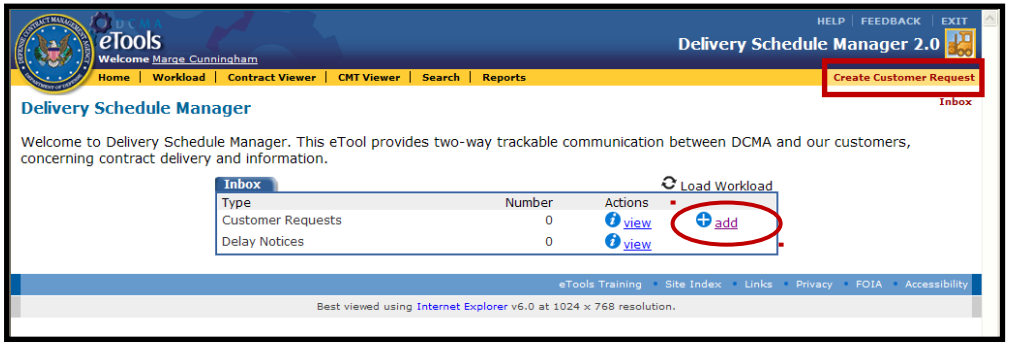
Create a Customer Request – Search for the Contract Number

A Customer Request can be created either by clicking **Create Customer Request** from the menu bar or on the Home page by clicking **add** from the Customer Request Line of Inbox.

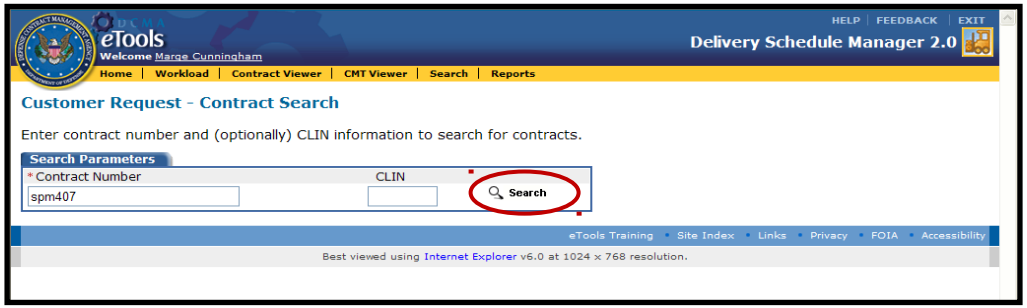
The first step of creating a request is performing a search on the contract number to see whether it exists. If not, it will need to be added.

NOTE: A newly added wildcard search will return up to 2000 results per contract number. If the results exceed 2000, the user is notified.

Creating a Customer Request (Graphics 2.1.1 - 2.1.2)	
1.	*Click* the add **link** on the Customer Request line of the Inbox.
2	*Enter* the **Contract Number.** • A partial contract number is accepted • The **CLIN** is optional
3	*Click* the Search **link**. • The next slide displays the possible outcomes


eTools
Welcome Marge Cunningham
HELP | FEEDBACK | EXIT
Delivery Schedule Manager 2.0
Home | Workload | Contract Viewer | CMT Viewer | Search | Reports
Create Customer Request
Inbox
Delivery Schedule Manager
Welcome to Delivery Schedule Manager. This eTool provides two-way trackable communication between DCMA and our customers, concerning contract delivery and information.
Inbox
Load Workload
Type
Number
Actions
Customer Requests
0
view
add
Delay Notices
0
view
eTools Training • Site Index • Links • Privacy • FOIA • Accessibility
Best viewed using Internet Explorer v6.0 at 1024 x 768 resolution.

Graphic 2.1.1: Create (Add) Customer Request Links


eTools
Welcome Marge Cunningham
HELP | FEEDBACK | EXIT
Delivery Schedule Manager 2.0
Home | Workload | Contract Viewer | CMT Viewer | Search | Reports
Customer Request - Contract Search
Enter contract number and (optionally) CLIN information to search for contracts.
Search Parameters
*Contract Number
CLIN
spm407
Search
eTools Training • Site Index • Links • Privacy • FOIA • Accessibility
Best viewed using Internet Explorer v6.0 at 1024 x 768 resolution.

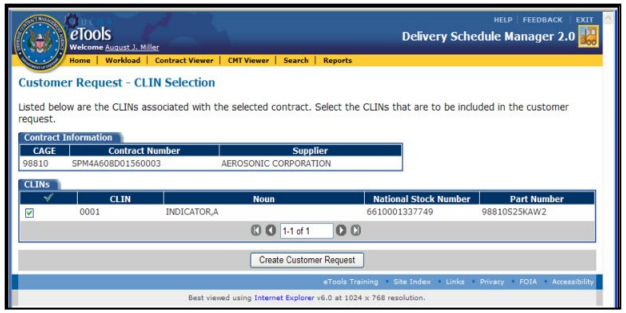
Graphic 2.1.2: Customer Request - Contract Search Parameters Tab

Topic One – Create a Customer Request

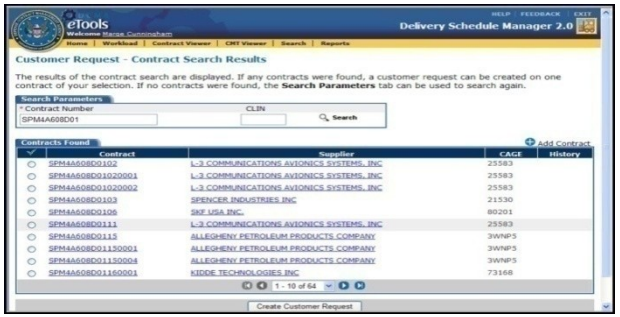
Create a Customer Request – Search Results

Depending on the criteria for the search and what was found in the database you will proceed through one of four possible outcomes. The slide and the next show a quick snapshot of those four outcomes. The rest of the topics in this Module will demonstrate the outcomes in depth.

	Search Results	Outcome
1.	A Contract is found without a CLIN.	When the contract is found without a CLIN the CLIN Selection page displays allowing you to choose the appropriate CLIN. (Graphic 2.1.3) This process is covered in **Topic Two.**
2.	A contract number or partial contract number is entered and multiple contracts are found.	When multiple contracts are returned you will need to select the appropriate contract from the contract search results page. (Graphic 2.1.4) This process is covered in **Topic Three**.



Graphic 2.1.3: Customer Request – CLIN Selection



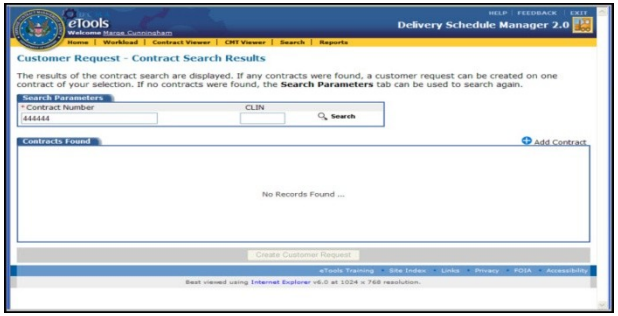
Graphic 2.1.4 : Customer Request – Contract Search Results

Course Topics

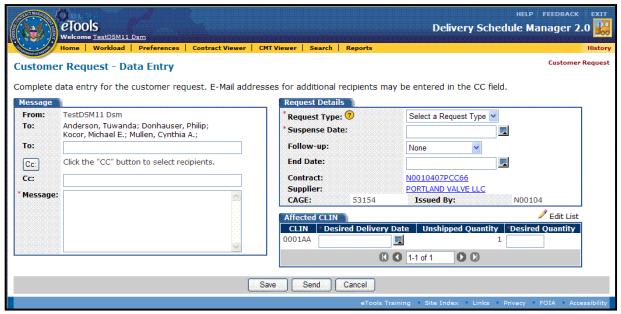
Topic One – Create a Customer Request

Create a Customer Request – Search Query Results

	Search Results	Outcome
3.	No contract is found indicating that it has not yet been entered into MOCAS.	When no contract is found add the contract into DSM by selecting the Add Contract link. (Graphic 2.1.5) This process is covered in **Topic Four**.
4.	A contract and CLIN are found.	The Data Entry page displays allowing you to start creating the request. (Graphic 2.1.6) This process is covered in **Topic Five**.



Graphic 2.1.5: Customer Request – No Contract Found



Graphic 2.1.6: Customer Request – Data Entry Page

No matter which of the four outcomes occur each finishes with you filling out the Request in the Data Entry page. Data Entry is covered fully in **Topic Five**.

Course Topics

Topic Two - Contract Found CLIN Selection

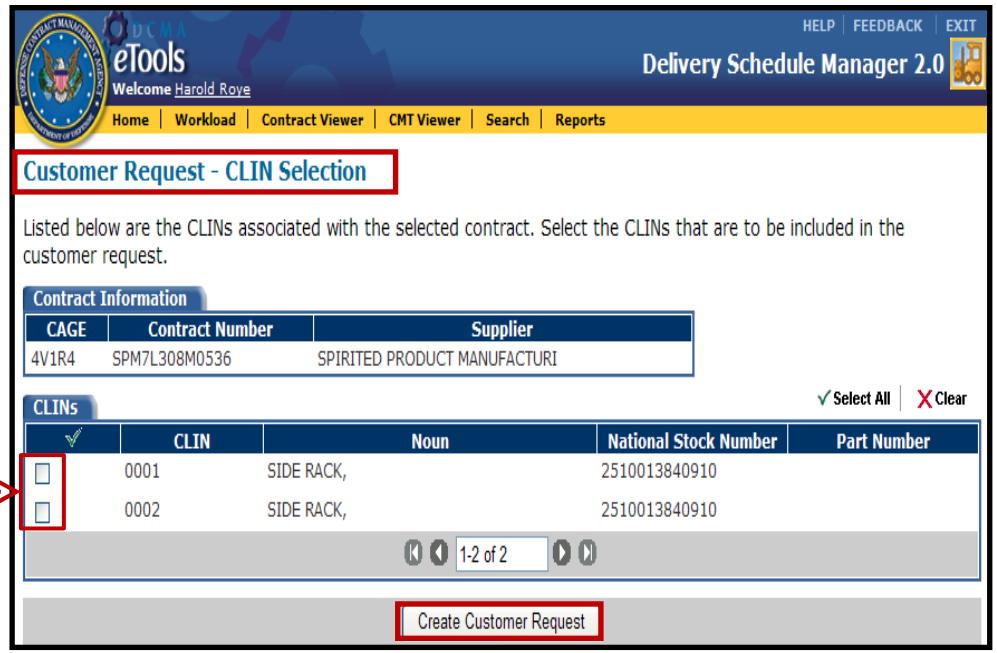
Creating a Customer Request – CLIN Selection

When a contract search is performed and a contract is found but the CLIN doesn't match or wasn't specified, the Customer Request - CLIN Selection page will appear.

Any CLIN(s) associated with the contract are listed. From this page you can select specific CLIN(s) to be added to the request.

A Customer Request can be created without any CLIN(s) selected only if the Contract does not have CLINs or all CLINs are shipped complete.

Customer Request - CLIN Selection (Graphic 2.2.1)	
1.	Contract search results found a contract without a CLIN.
2.	*Click* the **Select All** link. • All CLINs are selected
4.	*Click* the **Clear** link to clear selections.
5.	*Click* the **checkbox** for the appropriate **CLINs**. • A CLIN is not required to proceed
6.	*Click* **Create Customer Request.** • The Data Entry page displays • The Data Entry page is covered fully in **Topic Five**



Graphic 2.2.1: Customer Request - CLIN Selection Page

Course Topics

Topic Three - Multiple Contracts Found

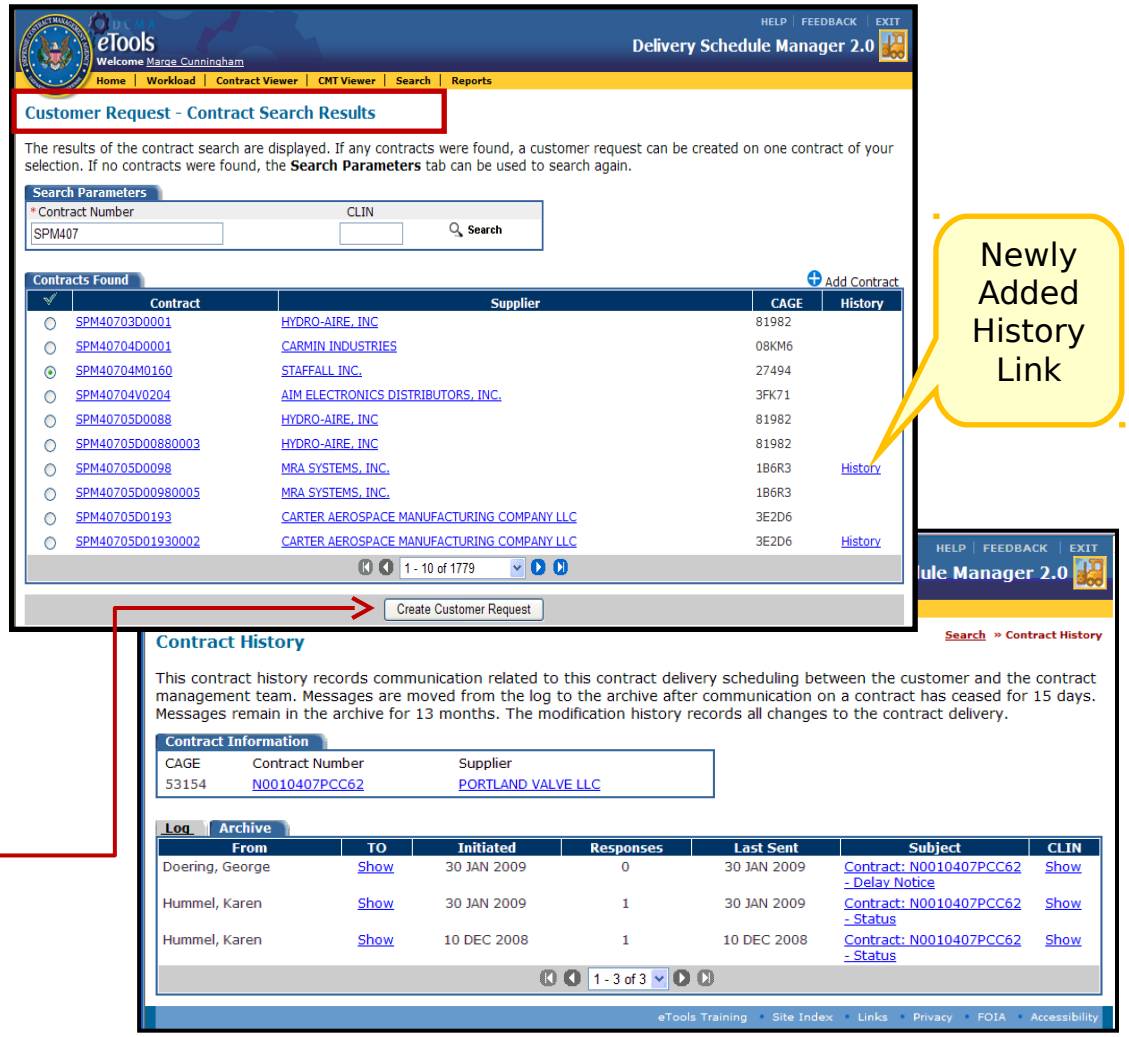
Customer Request - Multiple Contracts Found

If a contract number, or a partial contract number is entered and multiple contracts are found, The Contract Search Results page displays.

From this page you can choose the appropriate contract by selecting the radio button to it's left.

NOTE: A newly added History link is now available when a contract has had a record of communications.

Multiple Contracts Found (Graphic 2.3.1)	
1.	A **Contract search** was *performed* and, multiple contracts were found. • If you do not see the appropriate contract an Add Contract link is available above the contracts found section
2.	*Click* the **History** link. (If one is available)
3.	*Close* the **History** window.
4.	*Click* the **Create Customer Request** button. • The CLIN selection page may display. Or, • The Data Entry page which is covered fully in **Topic Five**


eTools
Welcome Marge Cunningham
Delivery Schedule Manager 2.0
HELP | FEEDBACK | EXIT
Home | Workload | Contract Viewer | CMT Viewer | Search | Reports
Customer Request - Contract Search Results
The results of the contract search are displayed. If any contracts were found, a customer request can be created on one contract of your selection. If no contracts were found, the Search Parameters tab can be used to search again.
Search Parameters
* Contract Number
CLIN
SPM407
Search
Contracts Found
Add Contract
Contract
Supplier
CAGE
History
SPM40703D0001 HYDRO-AIRE, INC 81982
SPM40704D0001 CARMIN INDUSTRIES 08KM6
SPM40704M0160 STAFFALL INC. 27494
SPM40704V0204 AIM ELECTRONICS DISTRIBUTORS, INC. 3FK71
SPM40705D0088 HYDRO-AIRE, INC 81982
SPM40705D00880003 HYDRO-AIRE, INC 81982
SPM40705D0098 MRA SYSTEMS, INC. 1B6R3 History
SPM40705D00980005 MRA SYSTEMS, INC. 1B6R3
SPM40705D0193 CARTER AEROSPACE MANUFACTURING COMPANY LLC 3E2D6
SPM40705D01930002 CARTER AEROSPACE MANUFACTURING COMPANY LLC 3E2D6 History
1 - 10 of 1779
Create Customer Request
Newly Added History Link
Search » Contract History
Contract History
This contract history records communication related to this contract delivery scheduling between the customer and the contract management team. Messages are moved from the log to the archive after communication on a contract has ceased for 15 days. Messages remain in the archive for 13 months. The modification history records all changes to the contract delivery.
Contract Information
CAGE Contract Number Supplier
53154 N0010407PCC62 PORTLAND VALVE LLC
Log Archive
From TO Initiated Responses Last Sent Subject CLIN
Doering, George Show 30 JAN 2009 0 30 JAN 2009 Contract: N0010407PCC62 - Delay Notice Show
Hummel, Karen Show 30 JAN 2009 1 30 JAN 2009 Contract: N0010407PCC62 - Status Show
Hummel, Karen Show 10 DEC 2008 1 10 DEC 2008 Contract: N0010407PCC62 - Status Show
1 - 3 of 3
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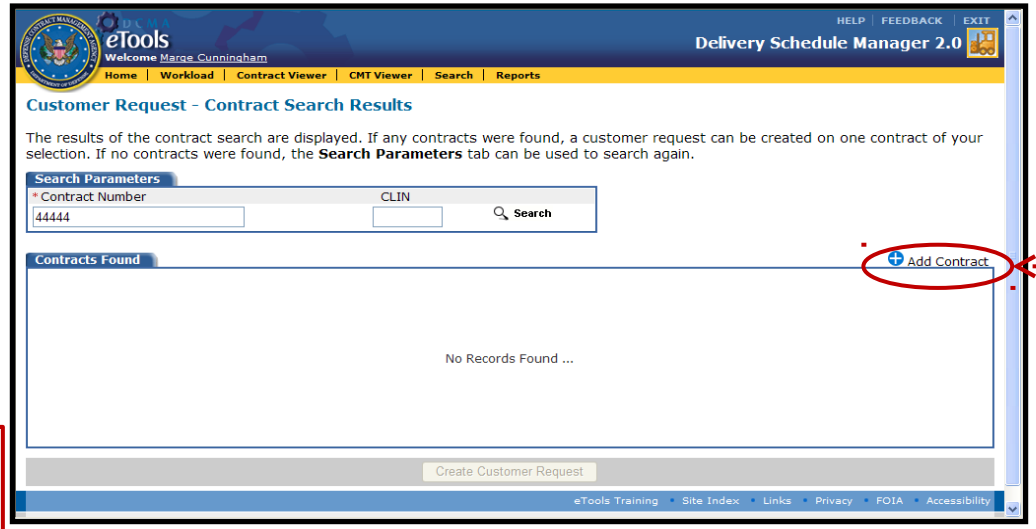
Graphic 2.3.1 : Multiple Contracts Found and Contract History

Topic Four - Contract Not Found

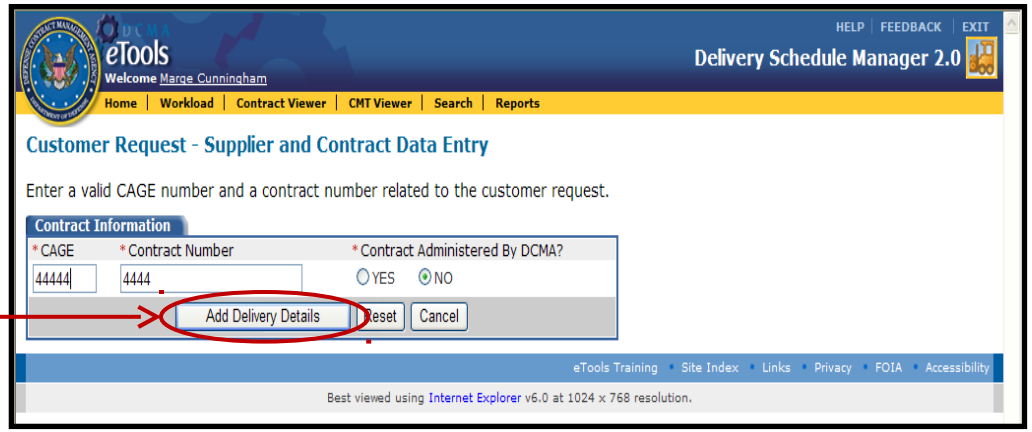
Customer Request – Manually Entering a Contract

If the contract is not found (it hasn't yet been entered into MOCAS), **No Records Found** will appear. You must manually add the contract to DSM.

Manually Entering a Contract (Graphic 2.4.1 – 2.4.2)	
1.	A Customer Request Contract search was performed and no contracts were found.
2.	*Select* the **Add Contract** link. (Graphic 2.4.1) • The Supplier and Contract Data Entry Page displays (Graphic 2.4.2) • The Contract Number is auto-populated from the contract search
3.	*Enter* a valid **CAGE** code.
4.	*Select* the appropriate **radio button** for the **Content Administered By DCMA** field.
5.	*Click* **Add Delivery Details.** • The CLIN Details Data Entry page displays
	Continued on next slide


eTools
Welcome Marge Cunningham
HELP | FEEDBACK | EXIT
Delivery Schedule Manager 2.0
Home | Workload | Contract Viewer | CMT Viewer | Search | Reports
Customer Request - Contract Search Results
The results of the contract search are displayed. If any contracts were found, a customer request can be created on one contract of your selection. If no contracts were found, the Search Parameters tab can be used to search again.
Search Parameters
*Contract Number
CLIN
44444
Search
Contracts Found
Add Contract
No Records Found ...
Create Customer Request
eTools Training | Site Index | Links | Privacy | FOIA | Accessibility

Graphic 2.4.1 Contract Search Resulted in No Records Found

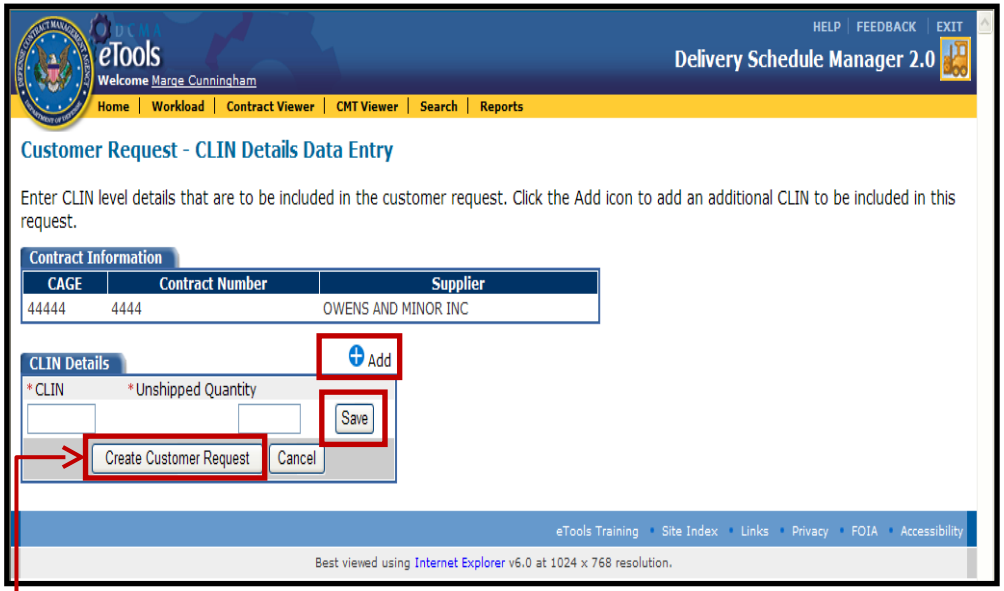

eTools
Welcome Marge Cunningham
HELP | FEEDBACK | EXIT
Delivery Schedule Manager 2.0
Home | Workload | Contract Viewer | CMT Viewer | Search | Reports
Customer Request - Supplier and Contract Data Entry
Enter a valid CAGE number and a contract number related to the customer request.
Contract Information
*CAGE
*Contract Number
*Contract Administered By DCMA?
44444
4444
YES
NO
Add Delivery Details
Reset
Cancel
eTools Training | Site Index | Links | Privacy | FOIA | Accessibility
Best viewed using Internet Explorer v6.0 at 1024 x 768 resolution.

Graphic 2.4.2 Customer Request – Supplier and Contract Data Entry

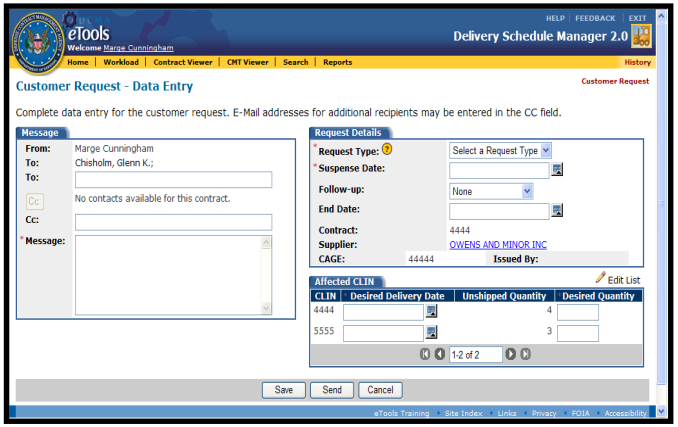
Topic Four - Contract Not Found

Customer Request – Manually Entering a Contract

Manually Entering a Contract (Graphic 2.4.3 – 2.4.3)	
6.	*Enter* **CLIN** details. • CLIN and Unshipped Quantity fields
7.	*Click* the **Save** button. • The CLIN information is saved and added to the CLIN Details
8.	*Click* the **Add** link. • Additional CLINs can be added by clicking the Add link.
9.	*Enter* **CLIN** details.
10	*Click* the **Save** button.
11	*Click* the **Create Customer Request** button. • The Data Entry page displays (Graphic 2.4.4) • The Data Entry page is covered fully in **Topic Five**


eTools
Welcome Marge Cunningham
HELP | FEEDBACK | EXIT
Delivery Schedule Manager 2.0
Home | Workload | Contract Viewer | CMT Viewer | Search | Reports
Customer Request - CLIN Details Data Entry
Enter CLIN level details that are to be included in the customer request. Click the Add icon to add an additional CLIN to be included in this request.
Contract Information
CAGE
Contract Number
Supplier
44444
4444
OWENS AND MINOR INC
CLIN Details
Add
*CLIN
*Unshipped Quantity
Save
Create Customer Request
Cancel
eTools Training | Site Index | Links | Privacy | FOIA | Accessibility
Best viewed using Internet Explorer v6.0 at 1024 x 768 resolution.

Graphic 2.4.3 : CLIN Details Tab



Graphic 2.4.4 : Customer Request Data Entry Page

Course Topics

Topic Five – Data Entry

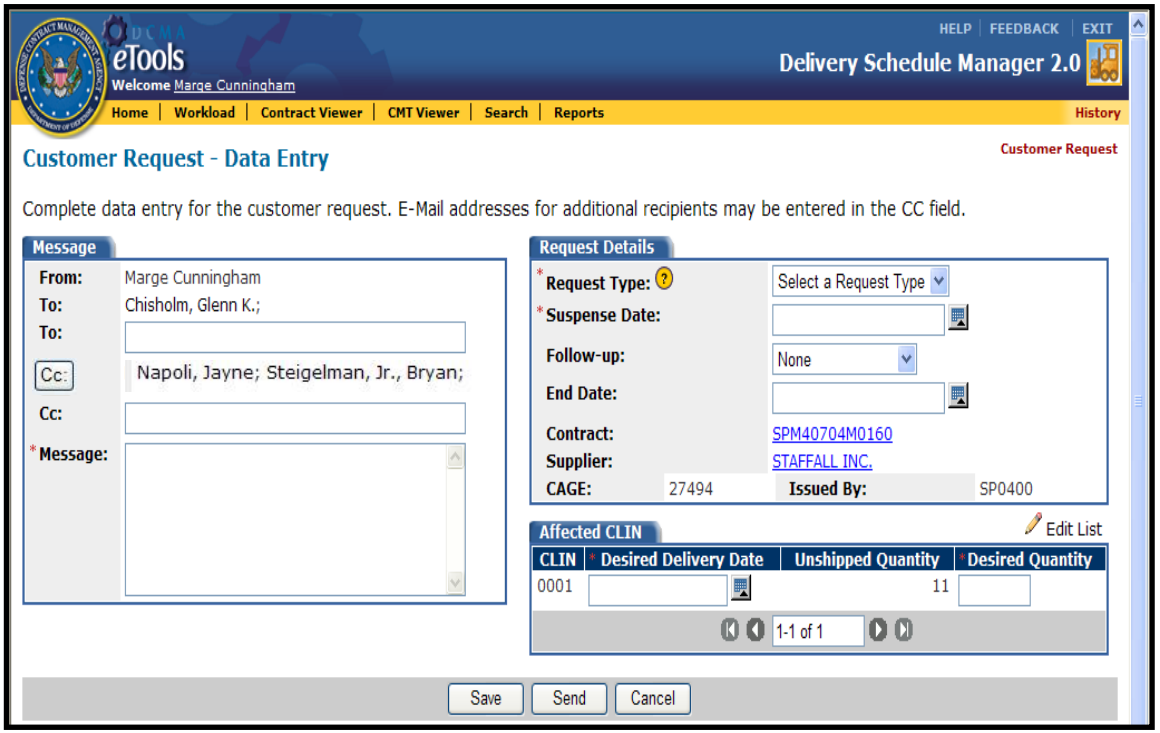
Customer Request - Data Entry

Topics One through Five in this lesson have covered several possible outcomes to performing a Contract Search when creating a Customer Request.

- Contract is found without a CLIN
- Multiple Contracts are found
- No Contract is found
- The Contract and CLIN information is found

No matter which situation occurred when performing the search – the last step in Creating a Customer Request is filling out the Data Entry page. (Graphic 2.5.1)

This topic covers the process of filling out the Data Entry page.


HELP | FEEDBACK | EXIT
eTools
Welcome Marge Cunningham
Delivery Schedule Manager 2.0
Home | Workload | Contract Viewer | CMT Viewer | Search | Reports | History
Customer Request - Data Entry
Customer Request
Complete data entry for the customer request. E-Mail addresses for additional recipients may be entered in the CC field.
Message
From: Marge Cunningham
To: Chisholm, Glenn K.;
To:
Cc: Napoli, Jayne; Steigelman, Jr., Bryan;
Cc:
*Message:
Request Details
*Request Type: Select a Request Type
*Suspense Date:
Follow-up: None
End Date:
Contract: SPM40704M0160
Supplier: STAFFALL INC.
CAGE: 27494 Issued By: SP0400
Affected CLIN
Edit List
CLIN | *Desired Delivery Date | Unshipped Quantity | *Desired Quantity
0001 11
1-1 of 1
Save Send Cancel

Graphic 2.5.1 : Customer Request - Data Entry page

Course Topics

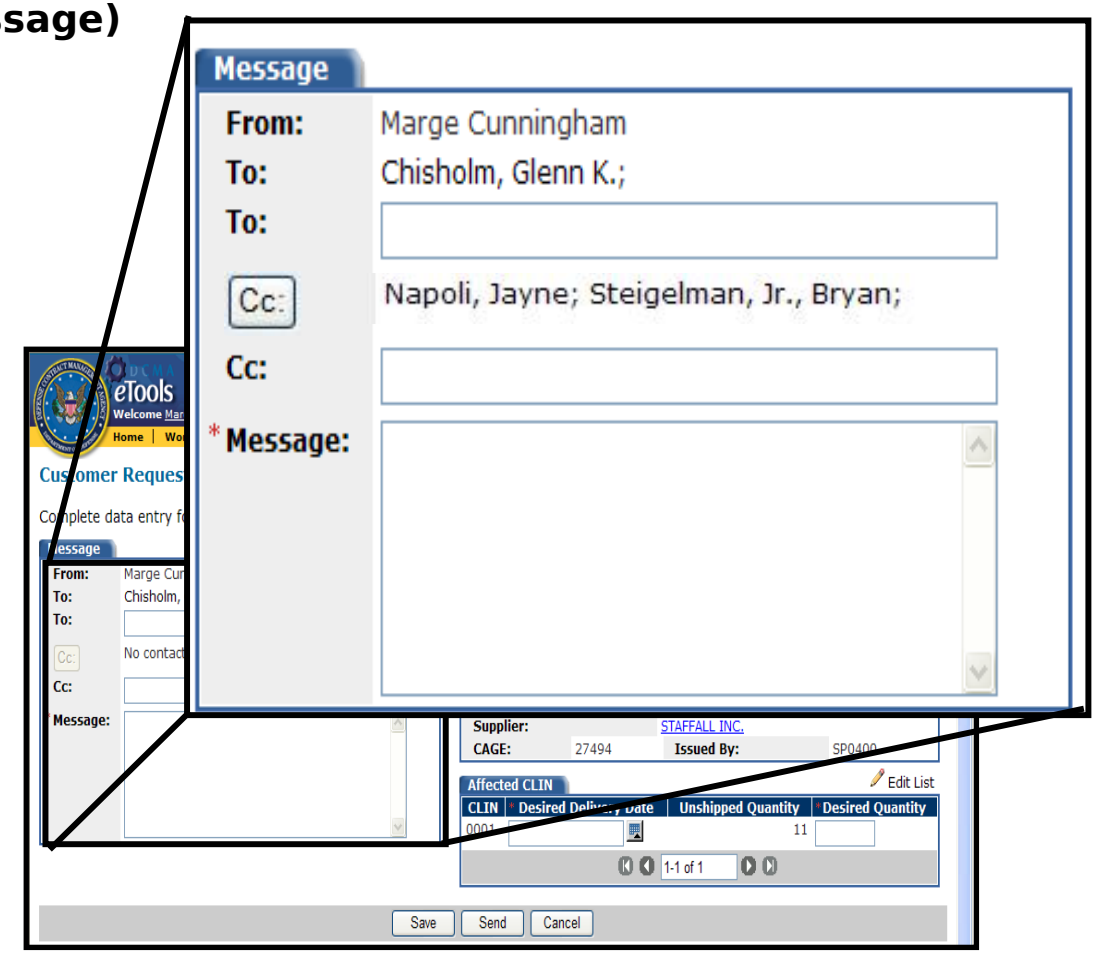
Topic Five – Data Entry

Customer Request - Data Entry (Message)

Complete the required data entry fields (identified by a red asterisk) for the customer request.

- The **From** field is the name of the person sending the request.
- The **To:** field is populated with members of the CMT and is not editable.
- The **To**: text entry field is where any valid E-Mail address can be added.
- The **Cc** Button: Allows you to access the "Recipient Pick List" to select additional customers associated with the contract to receive E-Mail notification.
- The **Cc:** field: A text field where any valid E-Mail address can be added.

Data Entry (Graphic 2.5.2)	
1.	*Enter* the desired **Message.** • Up to 4000 characters
2.	*Click* the **Cc:** button • The Recipient Pick list displays
	Continued on the next slide



Graphic 2.5.2 : Customer Request - Data Entry, Message Text Box

Course Topics

Topic Five – Data Entry

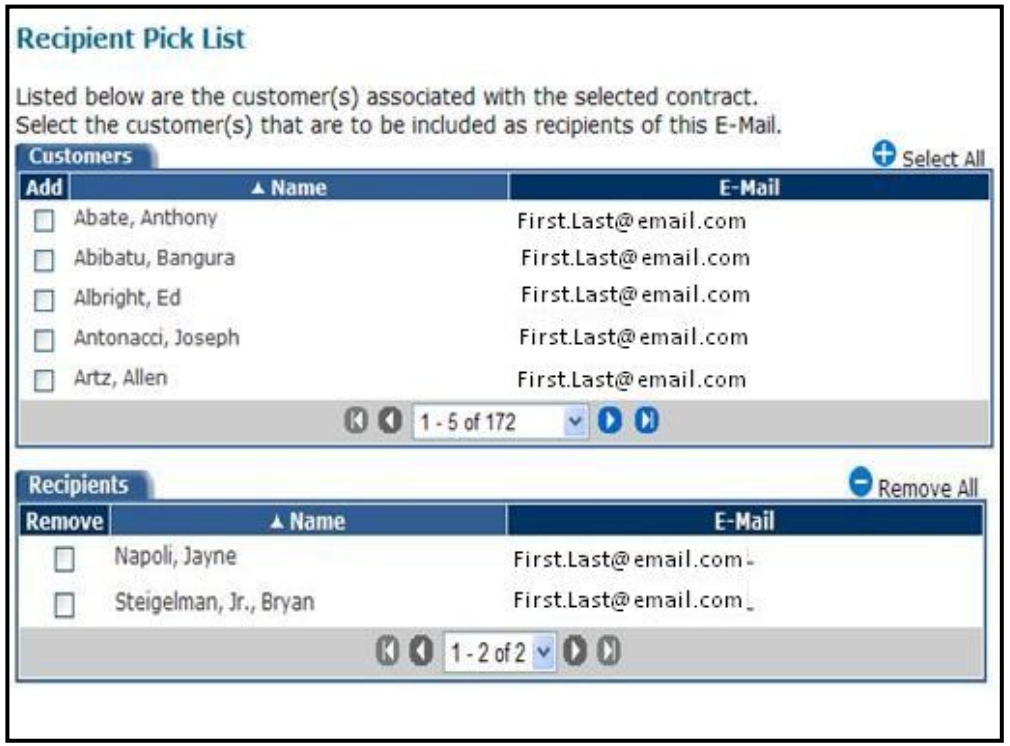
Customer Request – Data Entry (Recipient Pick List Page)

This page can be used to remove customers from the list of E-Mail notification addressees for a Delay Notice, Customer Request, or a response associated with either of these.

To add a single customer to the address list, click the checkbox for that user. Once a checkbox is checked it can be unchecked to deselect that customer.

NOTE: Select all should be rarely, if ever, used. Everyone who has signed up for the subject DoDAAC code will get the CR and every subsequent response. Users who do not have any involvement in subject CRs will get numerous unwanted notifications.

Recipient Pick List (Graphic 2.5.3)	
1.	*Click* the **Select All** button**.**
2.	*Click* the **Remove All** button**.**
3.	*Select* the **checkbox** for the desired recipients**.**
4.	*Click* the **Submit** button**.** • The Data Entry page displays the names selected in the pick list



Graphic 2.5.3 : Data Entry (Recipient Pick List)

Course Topics

Topic Five – Data Entry

Customer Request - Data Entry (Request Details)

The next tab contains the Request Details.

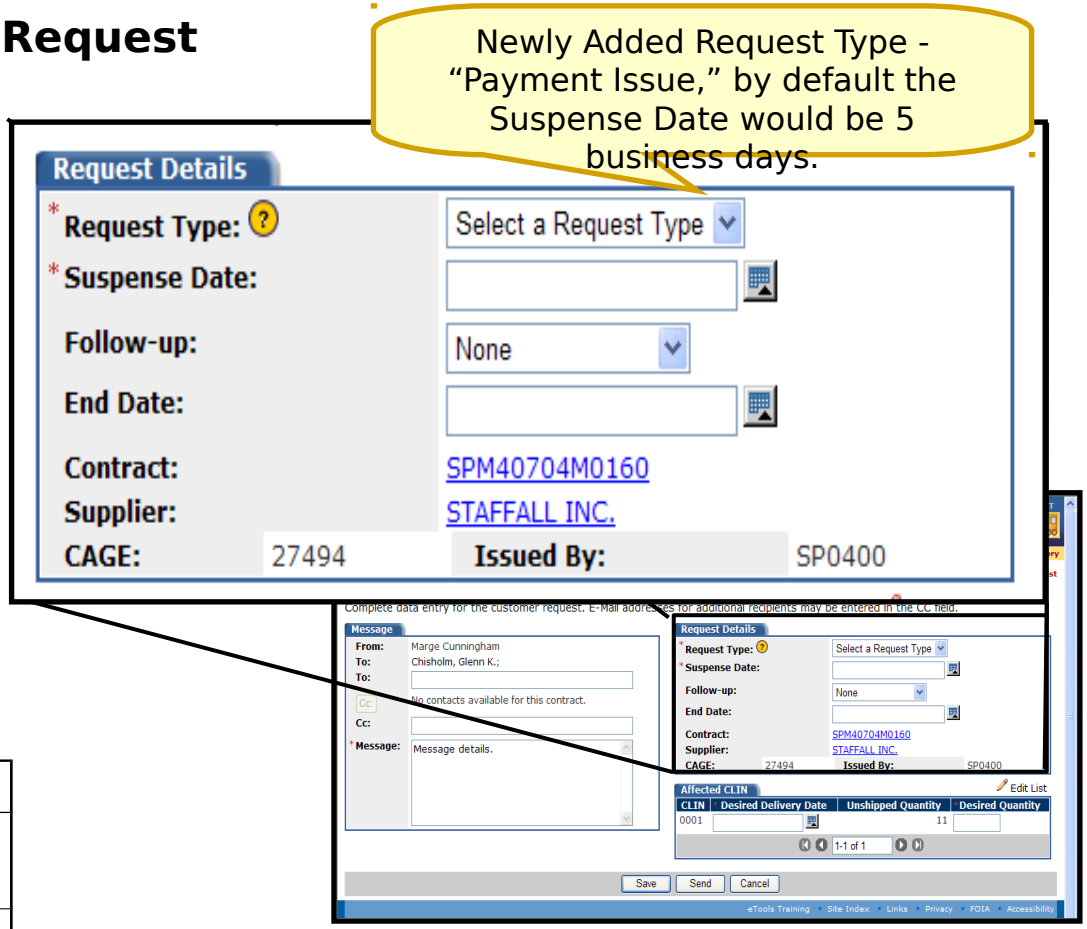
Request Type (definition table on next slide)

- Define a default suspense date.
- If request type of Status, Support, or Payment Issue are selected, then the "Desired Delivery Date" and the "Desired Quantity" fields in the "Affected CLIN" tab will no longer be available.
- The Request Types of Accelerate and Expedite have been merged into one Request Type.

Suspense Date

- This date must be at least two days from today's date. If this date lands on a weekend or holiday (based on the Federal Holiday calendar) then it will be advanced to the next available business day.
- If desired, click the calendar icon to select the End Date.

Data Entry – Request Details (Graphic 2.5.4)	
1	*Select* the **Request Type** from the drop-down menu.
2	*Select* the **Suspense Date**.
3	*Enter* any desired **additional information**.



Graphic 2.5.4: Customer Request - Data Entry, Request Details Tab

Topic Five – Data Entry

Customer Request - Data Entry (Request Details)

Accelerate/Expedite	A request for delivery earlier than the contract delivery date that may or may not include consideration and modification. Five Business Days
Back Order	A requirement exists that a Buying Activity cannot satisfy. Two Business Days
Crisis	A request for an item(s) that are directly related to the current crisis and are already causing mission non-capability. Two Business Days
Readiness	A request for high priority items that are affecting assigned Service missions or is anticipated to affect Service missions, but isn't part of a current conflict. Two Business Days
Status	Inquiries to determine if an item is on schedule. 5 Business Days
Support	Anything related to the contract that isn't specific to the other types of requests. Fi Business Days
Payment Issue	Requests for status or other information specifically related to payment. 5 Business Days

Topic Five – Data Entry

Customer Request - Request Details (Follow-Up)

Follow-up and End Date can be edited by the Customer or DCMA when responding. This field determines the frequency or necessity of a DCMA response to this request.

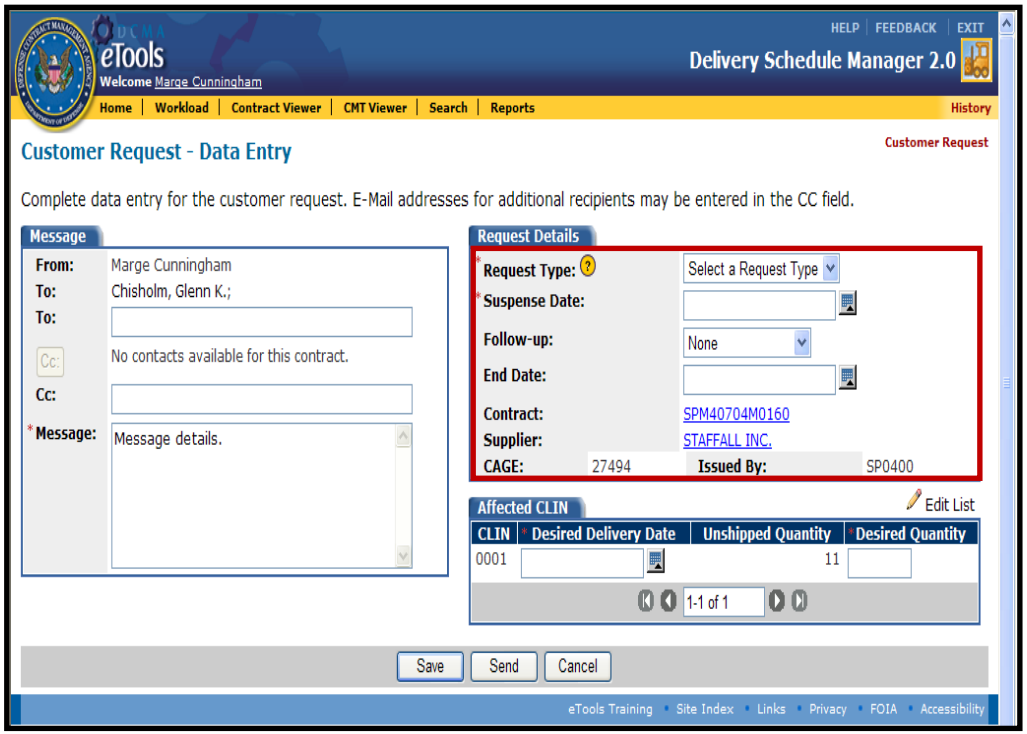
Follow-Up

"None" - DCMA will be required to respond to the initial request (Acknowledge receipt)

"Once - DCMA will be required to respond to the initial request and then follow up one additional time

"15/30" - DCMA is required to respond every 15/30 days until the follow-up is turned off via the value entered in the "End Date".

Creating a Customer Request (Graphic 2.5.5)	
1	*Select* the desired **Follow-up.**
2	*Select* the **End Date** using the calendar icon. • This can turn off the follow up requirement for DCMA
3	*Select* the **current date** from the calendar. - OR - *Select* **NONE** in the **Follow-up** field.


eTools
Welcome Marge Cunningham
HELP | FEEDBACK | EXIT
Delivery Schedule Manager 2.0
Home | Workload | Contract Viewer | CMT Viewer | Search | Reports | History
Customer Request - Data Entry
Customer Request
Complete data entry for the customer request. E-Mail addresses for additional recipients may be entered in the CC field.
Message
From: Marge Cunningham
To: Chisholm, Glenn K.;
To:
No contacts available for this contract.
Cc:
*Message: Message details.
Request Details
*Request Type: Select a Request Type
*Suspense Date:
Follow-up: None
End Date:
Contract: SPM40704M0160
Supplier: STAFFALL INC.
CAGE: 27494 Issued By: SP0400
Affected CLIN
Edit List
CLIN | *Desired Delivery Date | Unshipped Quantity | *Desired Quantity
0001 11
1-1 of 1
Save
Send
Cancel
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Graphic 2.5.5: Data Entry, Request Details tab

Course Topics

Topic Five – Data Entry

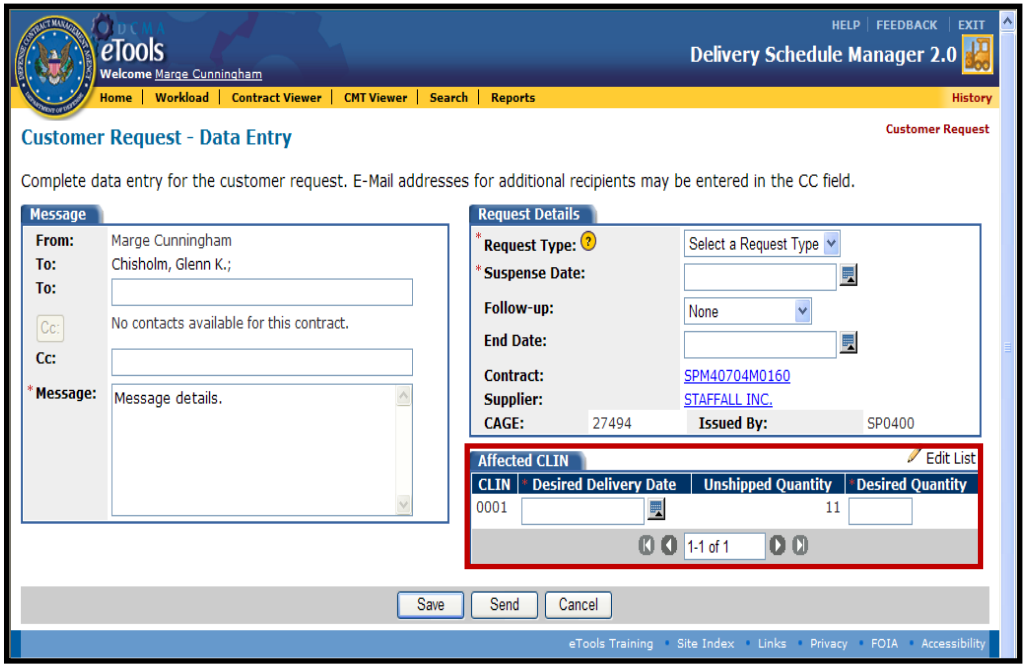
Customer Request – Affected CLIN

The CLIN(s) selected to be included in this Customer Request is/are displayed in the Affected CLIN tab.

If Status, Support, or Payment Issues were selected as the Request Type, the Desired Delivery Date and Desired Quantity fields, will not be available.

You can click the Save button to save the Customer Request as a draft, to return to it a later time.
Cancel can be used to cancel the creation of this Customer Request.

Affected CLIN (Graphic 2.5.6)	
1.	*Enter* the **Desired Delivery Date** • This must be a future date and **Desired Quantity** (must be less than or equal to the unshipped quantity within the **"**Affected CLIN tab" • The Edit List link can be used to edit the **CLIN list**
3.	*Click* the **Send** button • The Customer Request is sent to the list of recipients • The newly created Customer Request can now be found in the Workload


eTools
Welcome Marge Cunningham
HELP | FEEDBACK | EXIT
Delivery Schedule Manager 2.0
Home | Workload | Contract Viewer | CMT Viewer | Search | Reports | History
Customer Request - Data Entry
Customer Request
Complete data entry for the customer request. E-Mail addresses for additional recipients may be entered in the CC field.
Message
From: Marge Cunningham
To: Chisholm, Glenn K.;
To:
No contacts available for this contract.
Cc:
*Message: Message details.
Request Details
*Request Type: Select a Request Type
*Suspense Date:
Follow-up: None
End Date:
Contract: SPM40704M0160
Supplier: STAFFALL INC.
CAGE: 27494 Issued By: SP0400
Affected CLIN
Edit List
CLIN | *Desired Delivery Date | Unshipped Quantity | *Desired Quantity
0001 11
1-1 of 1
Save Send Cancel
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Graphic 2.5.6: Customer Request - Data Entry, Affected CLIN Tab

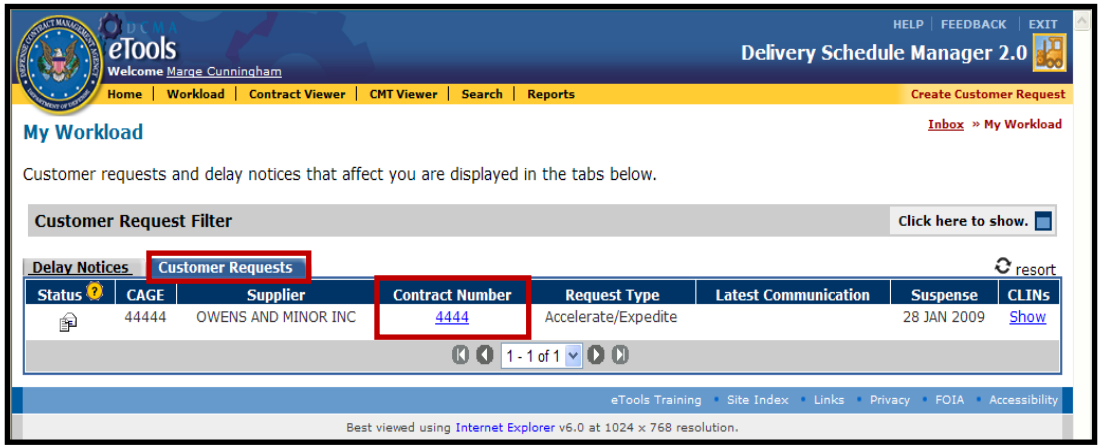
Topic Six – Retrieving Customer Requests

Retrieving a Saved Customer Request

When you Save the Customer Request, you will need to access your workload to retrieve the Saved (Draft) Customer Request.

From the Home page or Workload menu option, look under the Customer Request tab The icon in the Status column will identify that the contract is saved as a **draft.**

Locating a Saved Customer Request (Graphic 2.6.1)	
1	*Navigate* to your "**My Workload**".
2	*Filter* for the desired **Contract Number.**
3	*Click* the **Contract Number.** • The Customer Request – Data Entry Page Displays (Graphic 2.6.2)



Graphic 2.6.1: Workload – Retrieve Saved and Sent Requests

Course Topics

Topic Six – Retrieving Customer Requests

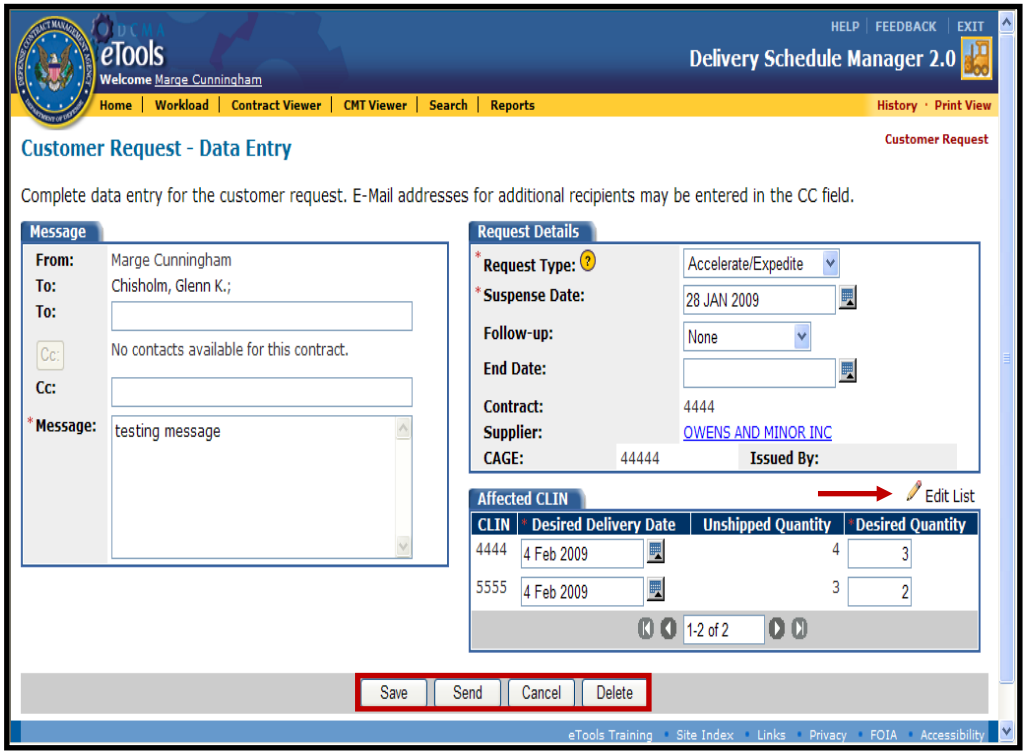
Retrieving a Saved Customer Request

Once you have retrieved the desired saved Customer Request, you have the following options:

- You make edits and re-**Save**
- **Send** the Customer Request
- **Cancel** the edit
- **Delete** the Customer Request

Only the initiator can delete a saved Customer Request.

Locating a Saved Customer Request (Graphic 3.1.2)	
1.	*Choose* the desired action. **Save, Send, Cancel, or Delete.** • Saved requests will reload CLIN data from SDW when edited • If those CLINs have been edited then they may no longer appear on this page • You may reselect any CLIN by clicking the Edit List link


eTools
Welcome Marge Cunningham
HELP | FEEDBACK | EXIT
Delivery Schedule Manager 2.0
Home | Workload | Contract Viewer | CMT Viewer | Search | Reports
History · Print View
Customer Request - Data Entry
Customer Request
Complete data entry for the customer request. E-Mail addresses for additional recipients may be entered in the CC field.
Message
From: Marge Cunningham
To: Chisholm, Glenn K.;
To:
No contacts available for this contract.
Cc:
*Message: testing message
Request Details
*Request Type: Accelerate/Expedite
*Suspense Date: 28 JAN 2009
Follow-up: None
End Date:
Contract: 4444
Supplier: OWENS AND MINOR INC
CAGE: 44444 Issued By:
Edit List
Affected CLIN
CLIN | *Desired Delivery Date | Unshipped Quantity | *Desired Quantity
4444 4 Feb 2009 4 3
5555 4 Feb 2009 3 2
1-2 of 2
Save
Send
Cancel
Delete
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Graphic 2.6.2 : Customer Request Creation Options

Course Topics

Module Two – Review

Module Two Covered the Following Topics:

Topic One	Create A Customer Request
Topic Two	Contract Found CLIN Selection
Topic Three	Multiple Contracts Found
Topic Four	Contract Not Found
Topic Five	Data Entry
Topic Six	Retrieving A Customer Request

Module Three

Additional Pages

Module Three – Topics

Module Three Topics

Topic One	Contract Details
Topic Two	Supplier Details
Topic Three	History Link
Topic Four	Print View Link
Topic Five	E-Mail Notification

Course Topics

Module Three – Objectives

At the end of Module Three you should be able to:

- Determine where to locate supplier details
- View the contract history details
- Print a View of the details of the Customer Request in Adobe Acrobat .PDF format

Course Topics

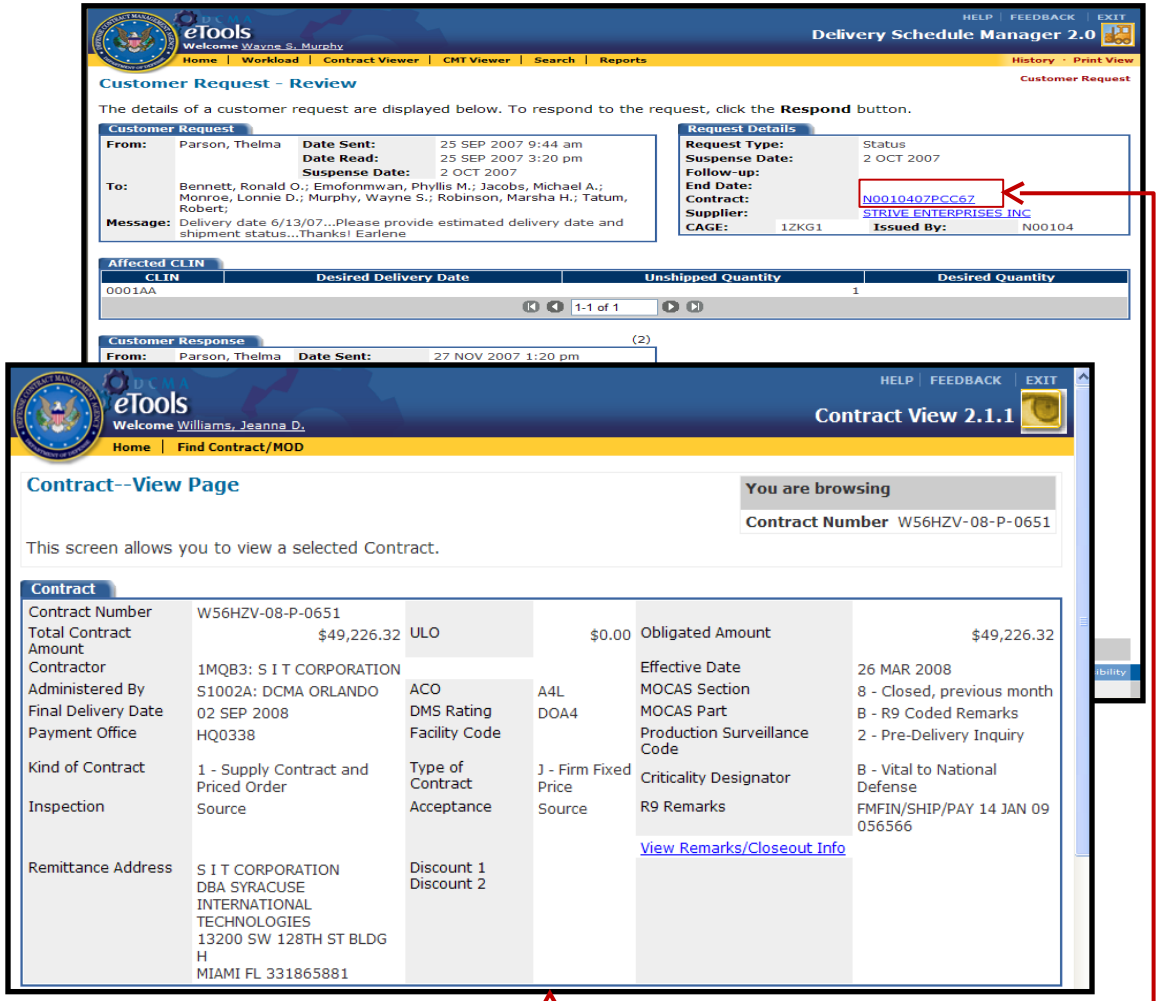
Topic One - Contract Details

Contract Details Page

When you click any Contract link, the Contract Details will populate, displaying the administrative details for the contract out of SDW.

To close the window, click the Close icon.

Contract Details Page (Graphics 3.1.1)	
1.	*Click* the **Contract Number** link. • From any Review Page • Contract - View Page opens
2.	*View* all **Contract Details**.


eTools
Welcome Wayne S. Murphy
Delivery Schedule Manager 2.0
Home | Workload | Contract Viewer | CMT Viewer | Search | Reports
Customer Request - Review
The details of a customer request are displayed below. To respond to the request, click the Respond button.
Customer Request
From: Parson, Thelma
Date Sent: 25 SEP 2007 9:44 am
Date Read: 25 SEP 2007 3:20 pm
Suspense Date: 2 OCT 2007
To: Bennett, Ronald O.; Emofonmwan, Phyllis M.; Jacobs, Michael A.; Monroe, Lonnie D.; Murphy, Wayne S.; Robinson, Marsha H.; Tatum, Robert;
Message: Delivery date 6/13/07...Please provide estimated delivery date and shipment status...Thanks! Earlene
Request Details
Request Type: Status
Suspense Date: 2 OCT 2007
Follow-up:
End Date:
Contract: N0010407PCC67
Supplier: STRIVE ENTERPRISES INC
CAGE: 1ZKG1
Issued By: N00104
Affected CLIN
CLIN | Desired Delivery Date | Unshipped Quantity | Desired Quantity
0001AA 1
1-1 of 1
Customer Response
From: Parson, Thelma Date Sent: 27 NOV 2007 1:20 pm
eTools
Welcome Williams, Jeanna D.
Contract View 2.1.1
Home | Find Contract/MOD
Contract--View Page
You are browsing
Contract Number W56HZV-08-P-0651
This screen allows you to view a selected Contract.
Contract
Contract Number W56HZV-08-P-0651
Total Contract Amount $49,226.32
ULO $0.00
Obligated Amount $49,226.32
Contractor 1MQB3: S I T CORPORATION
Effective Date 26 MAR 2008
Administered By S1002A: DCMA ORLANDO
ACO A4L
MOCAS Section 8 - Closed, previous month
Final Delivery Date 02 SEP 2008
DMS Rating DOA4
MOCAS Part B - R9 Coded Remarks
Payment Office HQ0338
Facility Code
Production Surveillance Code 2 - Pre-Delivery Inquiry
Kind of Contract 1 - Supply Contract and Priced Order
Type of Contract J - Firm Fixed Price
Criticality Designator B - Vital to National Defense
Inspection Source
Acceptance Source
R9 Remarks FMFIN/SHIP/PAY 14 JAN 09 056566
View Remarks/Closeout Info
Remittance Address S I T CORPORATION DBA SYRACUSE INTERNATIONAL TECHNOLOGIES 13200 SW 128TH ST BLDG H MIAMI FL 331865881
Discount 1
Discount 2

Graphic 3.1.1 : Contract Number Link Opens The Contract View Page

Course Topics

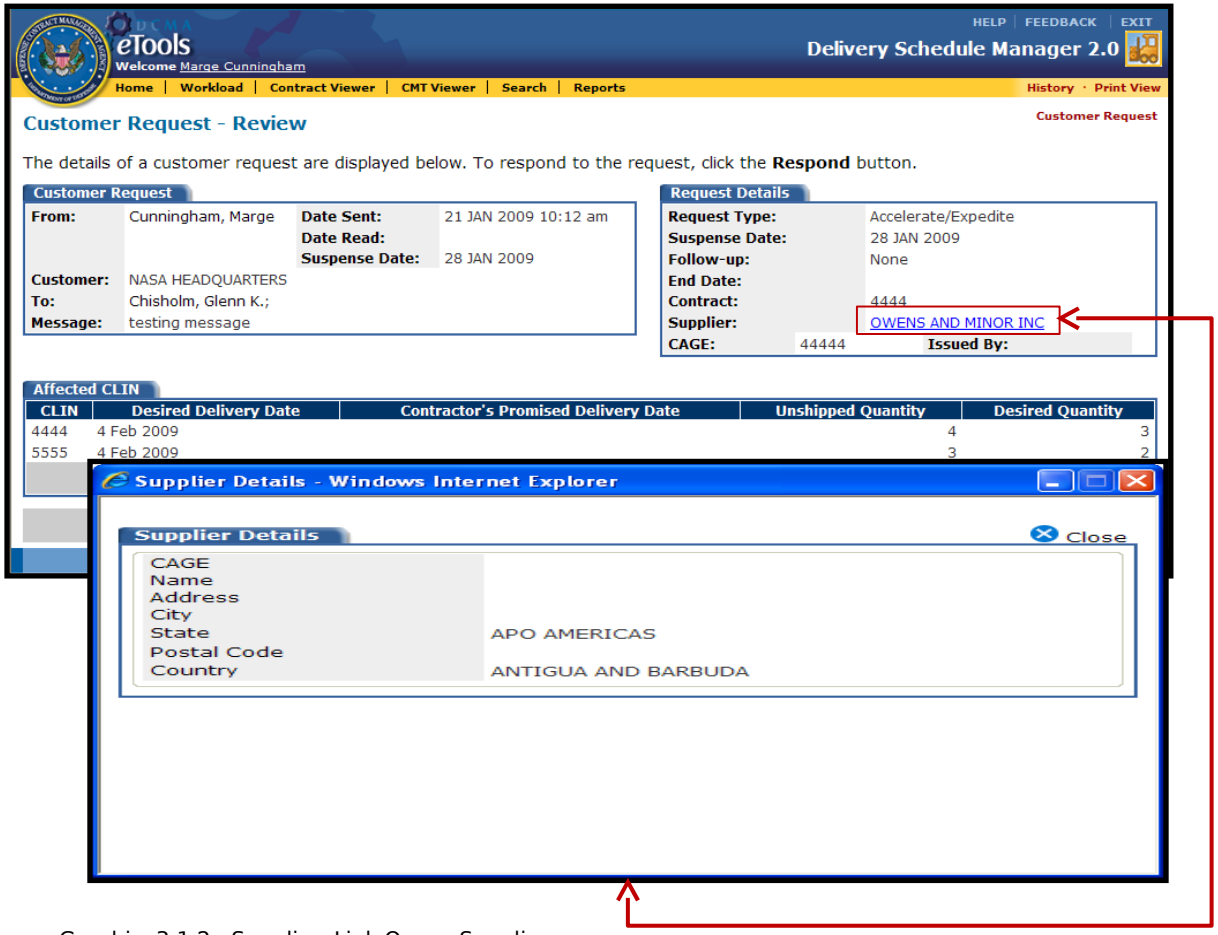
Topic Two - Supplier Details

Supplier Details Page

When you click on any Supplier link, the Supplier Details will populate, displaying the identification and address details for vendors out of SDW.

To close the window, click the Close icon.

Supplier Details Page (Graphics 3.1.2)	
1.	*Click* the **Supplier** link. • From any Review page • Supplier Details page opens
2.	*View* all **Supplier Details**.


eTools
Welcome Marge Cunningham
HELP | FEEDBACK | EXIT
Delivery Schedule Manager 2.0
Home | Workload | Contract Viewer | CMT Viewer | Search | Reports
History · Print View
Customer Request - Review
Customer Request
The details of a customer request are displayed below. To respond to the request, click the Respond button.
Customer Request
From: Cunningham, Marge
Date Sent: 21 JAN 2009 10:12 am
Date Read:
Suspense Date: 28 JAN 2009
Customer: NASA HEADQUARTERS
To: Chisholm, Glenn K.;
Message: testing message
Request Details
Request Type: Accelerate/Expedite
Suspense Date: 28 JAN 2009
Follow-up: None
End Date:
Contract: 4444
Supplier: OWENS AND MINOR INC
CAGE: 44444
Issued By:
Affected CLIN
CLIN | Desired Delivery Date | Contractor's Promised Delivery Date | Unshipped Quantity | Desired Quantity
4444 | 4 Feb 2009 | 4 | 3
5555 | 4 Feb 2009 | 3 | 2
Supplier Details - Windows Internet Explorer
Supplier Details
Close
CAGE
Name
Address
City
State APO AMERICAS
Postal Code
Country ANTIGUA AND BARBUDA

Graphic 3.1.2 : Supplier Link Opens Supplier Details Page

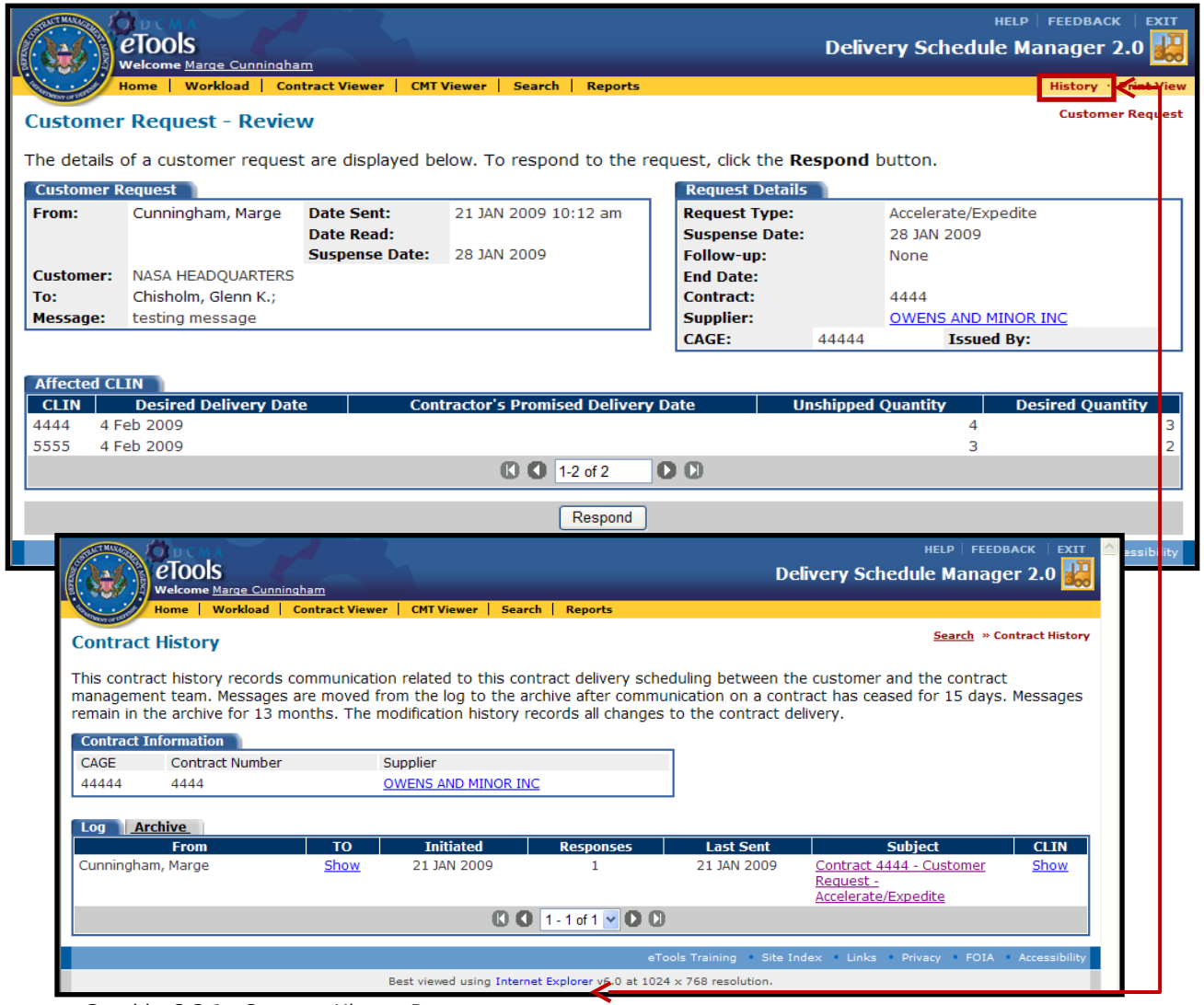
Course Topics

Topic Three - History Link

History Link

Clicking on any **History** link will display the Contract History records (communications related to the contract delivery scheduling between the customer and the contract management team).

See the Contract History (Graphic 3.3.1) page for details.


eTools
Welcome Marge Cunningham
HELP | FEEDBACK | EXIT
Delivery Schedule Manager 2.0
Home | Workload | Contract Viewer | CMT Viewer | Search | Reports
History
Customer Request - Review
The details of a customer request are displayed below. To respond to the request, click the Respond button.
Customer Request
From: Cunningham, Marge
Date Sent: 21 JAN 2009 10:12 am
Date Read:
Suspense Date: 28 JAN 2009
Customer: NASA HEADQUARTERS
To: Chisholm, Glenn K.;
Message: testing message
Request Details
Request Type: Accelerate/Expedite
Suspense Date: 28 JAN 2009
Follow-up: None
End Date:
Contract: 4444
Supplier: OWENS AND MINOR INC
CAGE: 44444
Issued By:
Affected CLIN
CLIN | Desired Delivery Date | Contractor's Promised Delivery Date | Unshipped Quantity | Desired Quantity
4444 | 4 Feb 2009 | 4 | 3
5555 | 4 Feb 2009 | 3 | 2
1-2 of 2
Respond
eTools
Welcome Marge Cunningham
HELP | FEEDBACK | EXIT
Delivery Schedule Manager 2.0
Home | Workload | Contract Viewer | CMT Viewer | Search | Reports
Search » Contract History
Contract History
This contract history records communication related to this contract delivery scheduling between the customer and the contract management team. Messages are moved from the log to the archive after communication on a contract has ceased for 15 days. Messages remain in the archive for 13 months. The modification history records all changes to the contract delivery.
Contract Information
CAGE | Contract Number | Supplier
44444 | 4444 | OWENS AND MINOR INC
Log | Archive
From | TO | Initiated | Responses | Last Sent | Subject | CLIN
Cunningham, Marge | Show | 21 JAN 2009 | 1 | 21 JAN 2009 | Contract 4444 - Customer Request - Accelerate/Expedite | Show
1 - 1 of 1
eTools Training | Site Index | Links | Privacy | FOIA | Accessibility
Best viewed using Internet Explorer v6.0 at 1024 x 768 resolution.

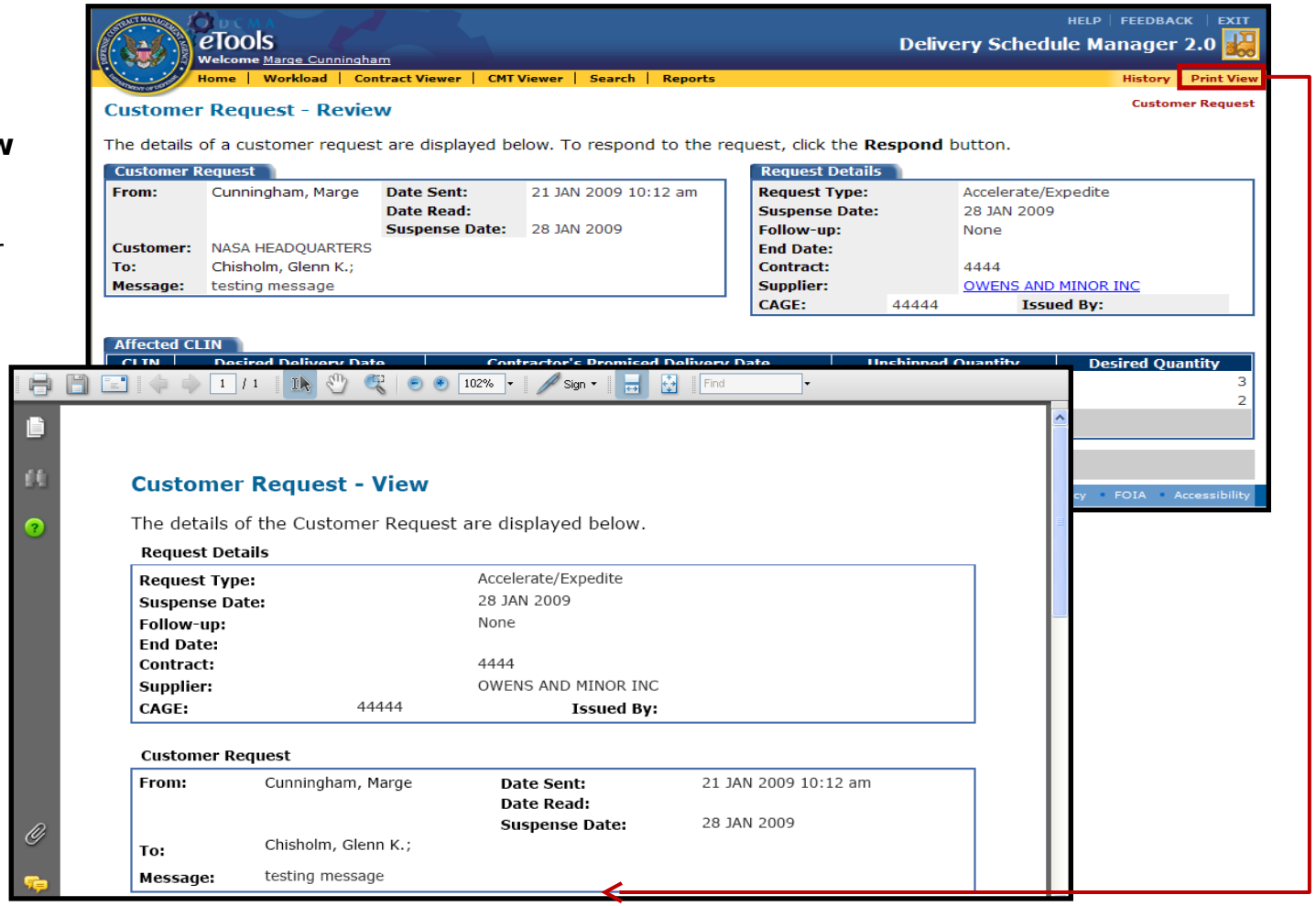
Graphic 3.3.1 : Contract History Page

Course Topics

Topic Four - Print View Link

Print View Link

Clicking on the **Print View** link will populate the details of the Customer Request in .PDF format for viewing or marking-up. (Graphic 4.1.1)



Graphic 4.1.1: Customer Request in .PDF Format

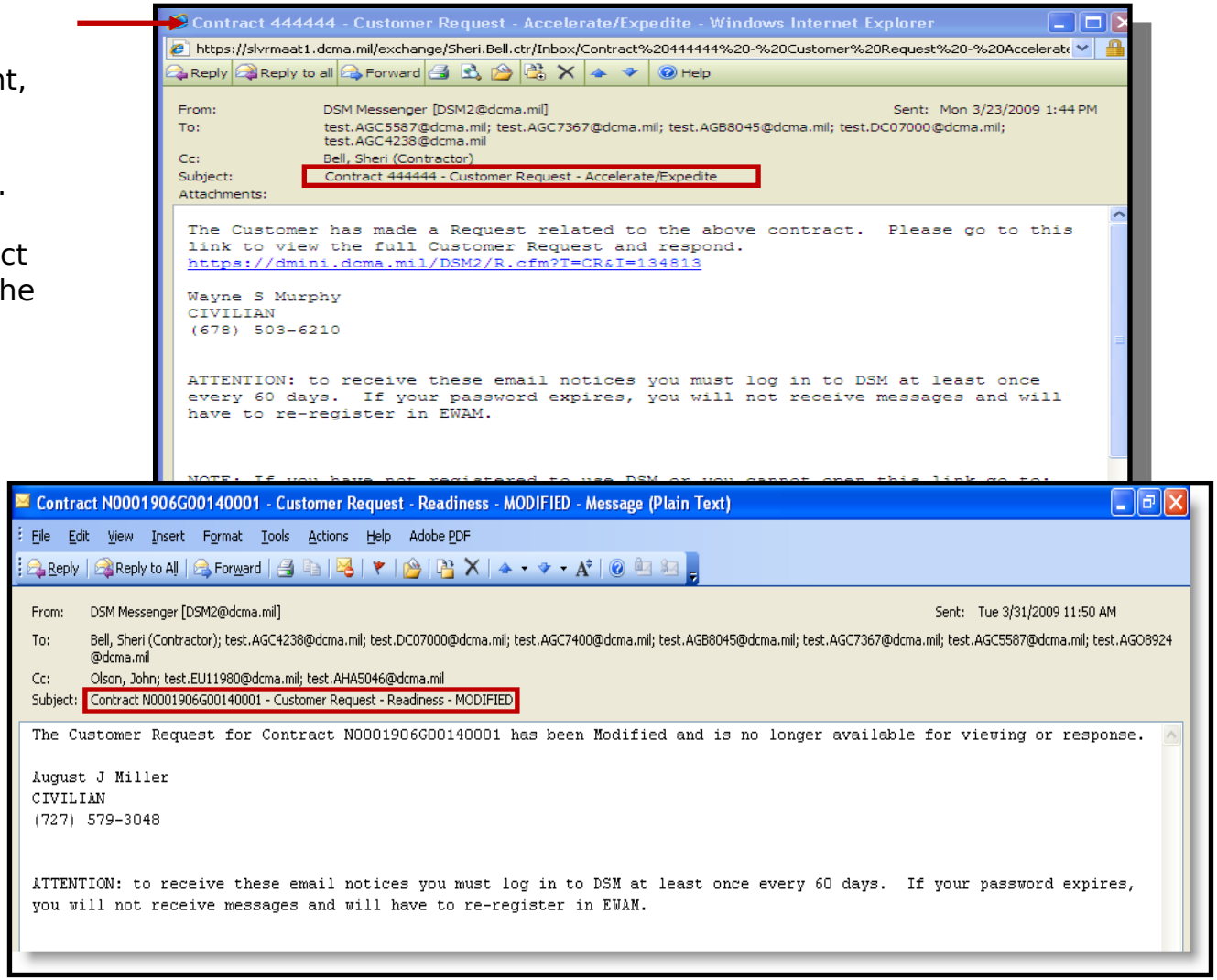
Course Topics

Topic Five – E-Mail Notifications

E-Mail Notifications

When a Customer Request is Sent, Edited & Resent, …an Email notification is sent to those identified in the To and Cc: fields.

If there are Responses, the subject field will identify the number at the end.


Contract 444444 - Customer Request - Accelerate/Expedite - Windows Internet Explorer
https://slvrmaat1.dcma.mil/exchange/Sheri.Bell.ctr/Inbox/Contract%20444444%20-%20Customer%20Request%20-%20Accelerat
Reply
Reply to all
Forward
Help
From: DSM Messenger [DSM2@dcma.mil]
Sent: Mon 3/23/2009 1:44 PM
To: test.AGC5587@dcma.mil; test.AGC7367@dcma.mil; test.AGB8045@dcma.mil; test.DC07000@dcma.mil; test.AGC4238@dcma.mil
Cc: Bell, Sheri (Contractor)
Subject: Contract 444444 - Customer Request - Accelerate/Expedite
Attachments:
The Customer has made a Request related to the above contract. Please go to this link to view the full Customer Request and respond.
https://dmini.dcma.mil/DSM2/R.cfm?T=CR&I=134813
Wayne S Murphy
CIVILIAN
(678) 503-6210
ATTENTION: to receive these email notices you must log in to DSM at least once every 60 days. If your password expires, you will not receive messages and will have to re-register in EWAM.
Contract N0001906G00140001 - Customer Request - Readiness - MODIFIED - Message (Plain Text)
File Edit View Insert Format Tools Actions Help Adobe PDF
Reply
Reply to All
Forward
From: DSM Messenger [DSM2@dcma.mil]
Sent: Tue 3/31/2009 11:50 AM
To: Bell, Sheri (Contractor); test.AGC4238@dcma.mil; test.DC07000@dcma.mil; test.AGC7400@dcma.mil; test.AGB8045@dcma.mil; test.AGC7367@dcma.mil; test.AGC5587@dcma.mil; test.AGO8924@dcma.mil
Cc: Olson, John; test.EU11980@dcma.mil; test.AHA5046@dcma.mil
Subject: Contract N0001906G00140001 - Customer Request - Readiness - MODIFIED
The Customer Request for Contract N0001906G00140001 has been Modified and is no longer available for viewing or response.
August J Miller
CIVILIAN
(727) 579-3048
ATTENTION: to receive these email notices you must log in to DSM at least once every 60 days. If your password expires, you will not receive messages and will have to re-register in EWAM.

Graphic 5.1.1: Edit & Resend Customer Request E-Mail Notification Example

Course Topics

Module Four – Review

Module Four Covered the Following Topics:

Topic One	Contract Details
Topic Two	Supplier Details
Topic Three	History Link
Topic Four	Print View Link
Topic Five	E-Mail Notification

Course Topics